

May 5, 2009

Ladies and Gentlemen:

As Comptroller, I am committed to creating an environment that encourages the Texas economy to thrive. As part of this effort, my office conducts an ongoing study of factors affecting the state economy. One result of this work is our *Texas in Focus* series of reports, which provides unique data and analysis on the state's 12 distinct economic regions. We have designed this series to provide state and local decision-makers with valuable tools for guiding and assisting economic growth.

Today, I am pleased to present our latest regional report, *Texas in Focus: Central Texas*, which examines trends and issues affecting the 20 counties comprising this region, and highlights its challenges and successes.

The Central Texas region's economic outlook remains encouraging. Government and the military, both relatively sheltered from recession, continue to play a prominent role in the Central Texas economy. For example, estimates indicate Fort Hood contributed \$10.9 billion to the Texas economy in 2007. Hospitals and health care providers are expanding to meet the region's needs. Central Texas' public school enrollment is on the rise and its institutions of higher education are increasing their number of graduates, generating a future work force suitable for high-paying jobs in the area.

I hope you will find this report helpful.

Sincerely,

Susan Combs







# Texas in Focus: Central Texas

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# Introduction

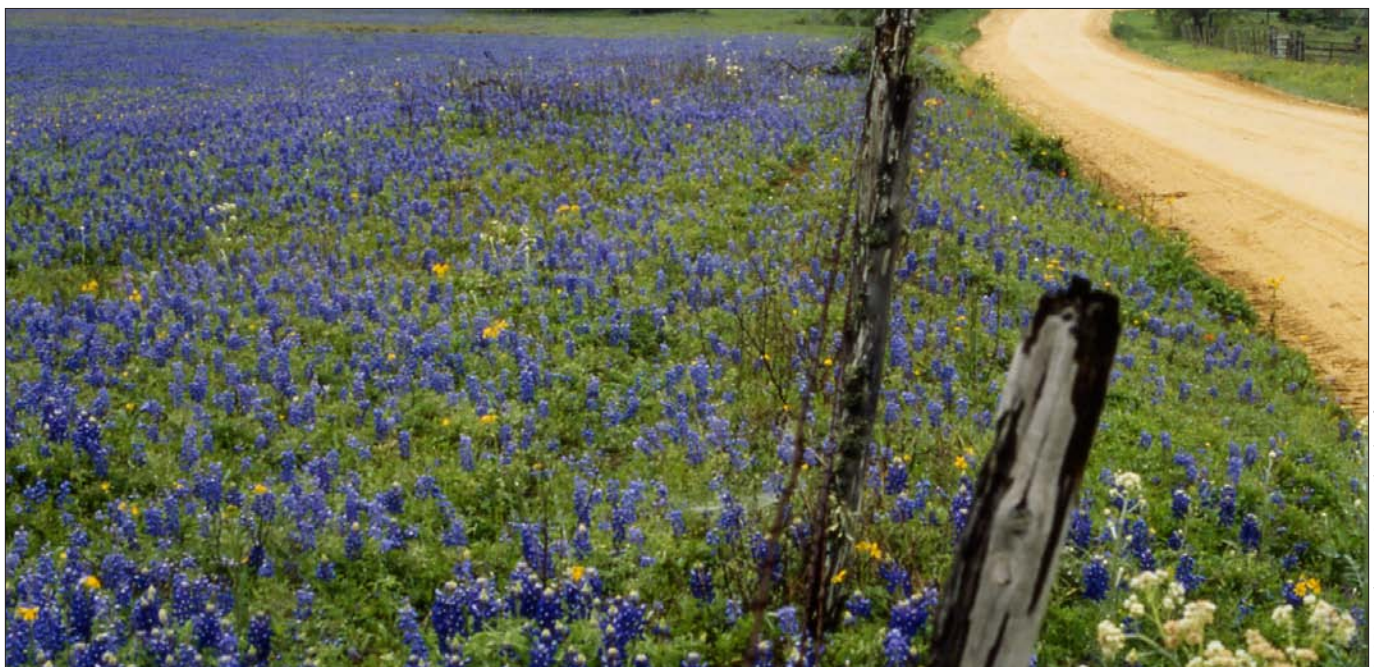
With its enormous size, vast array of natural resources and large population, Texas plays a significant role in the nation's economy. Our diverse economy helped buffer Texas from the national recession during most of 2008, making it one of the last states affected by lost production and jobs.

Our state's economy remains open for business. We are not, however, immune from these economic forces, and Texas will see job losses statewide during much of 2009.

It is important to all Texans that the state continues to grow and to discover new opportunities. And the role of state government is to create and foster an environment in which this can happen.

The Texas Comptroller analyzes factors affecting the state's economy and uses this information to prepare the biennial forecast of state revenue. To perform this task, our economists keep their fingers on the pulse of the state, detecting changes as they occur and identifying trends that will affect our future.

Since January 2008, the Comptroller has released four reports in the *Texas in Focus* series. *Texas in Focus: A Statewide View of Opportunities* examined issues affecting the state and its economy as a whole. The remainder of the series will consist of individual reports on each of the 12 economic regions of



Bluebonnets in Washington County.

PHOTO: Washington County Chamber of Commerce



Texas; those already issued examine the High Plains, South Texas and Upper East Texas regions. The reports provide detailed data and analysis specific to those regions, giving local leaders an in-depth look at their area.

This fifth report in the series, *Texas in Focus: Central Texas*, examines issues affecting an economic region including the Heart of Texas, Central Texas and Brazos Valley Councils of Governments. The Central Texas region consists of 20 counties in the East Central section of the state and includes the cities of Waco, Temple and Bryan-College Station (**Exhibit 1**).

This report provides information on the forces driving change in Central Texas, and examines factors that may affect the development of its economy. State leaders, county and city officials, chambers of commerce, economic development corporations and the general public can use this report to stay on top of important issues as they work to keep their local economies thriving. Areas explored in this report include:

### Economic Development

The Central Texas region's economic outlook remains favorable, with steady growth projected following the 2008-09 recession, similar to statewide projections. The region's growth should follow statewide patterns through 2013, led by Bryan-College Station, Temple and Waco. Regional industries such as professional and business services, agriculture, natural resources and mining should grow by more than 30 percent from 2003 through 2013, despite setbacks and fallout from the 2008-09 credit crisis.

### Demographics

Central Texas has three metropolitan statistical areas (MSAs) representing areas of dense population and active commerce. The populations of these MSAs, centered in Fort Hood, Waco and Bryan-College Station, each exceed 200,000 residents. The region has a more rural population than the rest of the state with nearly a quarter of the region's residents living outside a metropolitan area, compared to the statewide rural population of about 13 percent. Throughout the Central Texas region, personal income rose by more than 36 percent from 2001 to 2006, outpacing statewide growth.

### Infrastructure

Central Texas is a mix of prairie and hills crossed by rivers and streams, with additional water supplies in major aquifers and substantial coal, oil and natural gas deposits. One of the nation's most important transportation arteries, Interstate Highway 35, bisects the region, which also has unique and historically significant parks and recreational facilities. But like the rest of Texas, the region faces challenges in maintaining and expanding its infrastructure to meet its residents' needs.

### Health Care

Health care is an important engine of growth for Central Texas. Hospitals and other health care providers are among the largest private employers in the region's metropolitan areas. In addition, Central Texas is home to two Veterans' Affairs (VA) hospitals, one of them — the Olin E. Teague Veterans' Center, in Temple — the nation's fourth-largest VA medical complex. Hospitals in the region



region has a higher percentage of school districts rated as Academically Acceptable by the Texas Education Agency compared to the statewide average for this rating. It also offers 11 institutions of higher education, including Texas A&M University, six community colleges and two private universities, including Baylor University.

The growth of the Central Texas public school population is outpacing that of the region's total population. The Central Texas

## Central Texas Region









# Economic Development

The Central Texas countryside is characterized by two major geographic areas. On its eastern side, rolling prairies extend from Hillsboro south to Brenham. Traveling westward, slopes and cedars appear more frequently on the upper rim of the Texas Hill Country. This diverse landscape provides an array of resources that fuel regional industries and foster economic growth.

Mining is a traditional pillar of the regional economy. Enterprises such as clay, ceramic and refractory mining have remained robust, while value-added activities such as

wholesaling and transportation have evolved to support them.

Since the 1940s, the military has played a large role in the Central Texas economy. Fort Hood, in the Killeen area, has trained and deployed soldiers for military conflicts since World War II. The base's presence supports local communities and businesses while bringing in jobs from outside the state.

Manufacturing plays a pivotal role in the area's economy. Area businesses manufacture a broad range of products including lime, plastics, desserts and soft drinks. Blue Bell Ice Cream contributes to the region's manufacturing strength, and the Mars Snackfood operation in Waco makes products consumed throughout the world.

**Exhibit 2** shows employment estimates for the Central Texas region, including the

*(text continued on Page 7)*

*Manufacturing plays a pivotal role in the area's economy. Area businesses manufacture a broad range of products including lime, plastics, desserts and soft drinks.*



Opening day for Scott & White Canyon Creek Pharmacy in Temple.

PHOTO: Scott & White



### Zodiac Enterprises

Since January 2009, the city of Caldwell, a small community 25 miles southwest of Bryan-College Station, has been the Texas home of metal processor Zodiac Enterprises. The Caldwell operation converts aluminum oxide into aluminum sulfate for use by the petrochemical industry. The process effectively recycles metals for industrial reuse and produces no waste.<sup>1</sup>

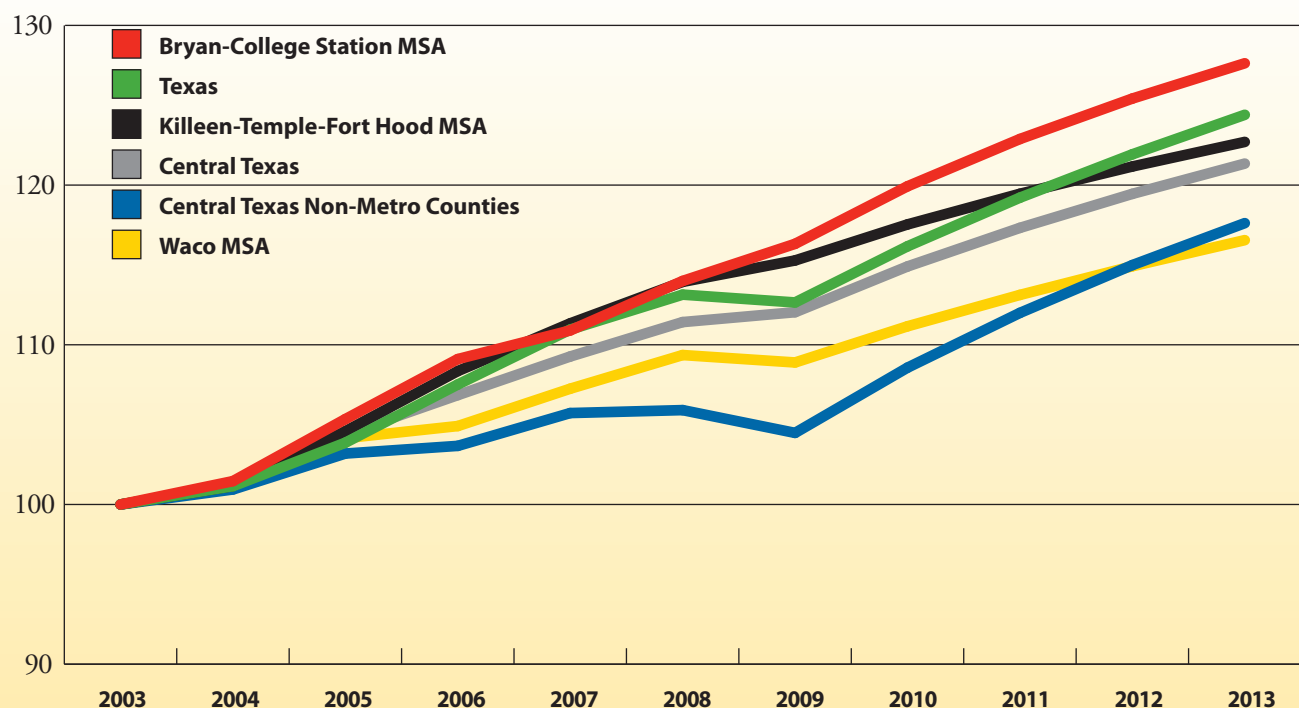
The California-based company cites Caldwell's proximity to major industrial cities, highways, railroads and Gulf Coast refineries as reasons for the location. Instead of purchasing an existing off-line plant, Zodiac developed a \$3 million 22-acre plot for its new facility, which will employ 22 local workers.<sup>2</sup>

To accommodate Zodiac's operational needs, the company helped the city obtain state grants for infrastructure development. As a result, Caldwell spent only \$275,000 on a new industrial boulevard and natural gas line.

Zodiac contributes more than just jobs to the local economy, it also attracts support services. Houston-based Inspectorate Corp. provides quality control monitoring at Zodiac's plant, and as the metal processor begins its next phases of production, it will draw more hydrometallurgical support.<sup>3</sup>

Exhibit 2

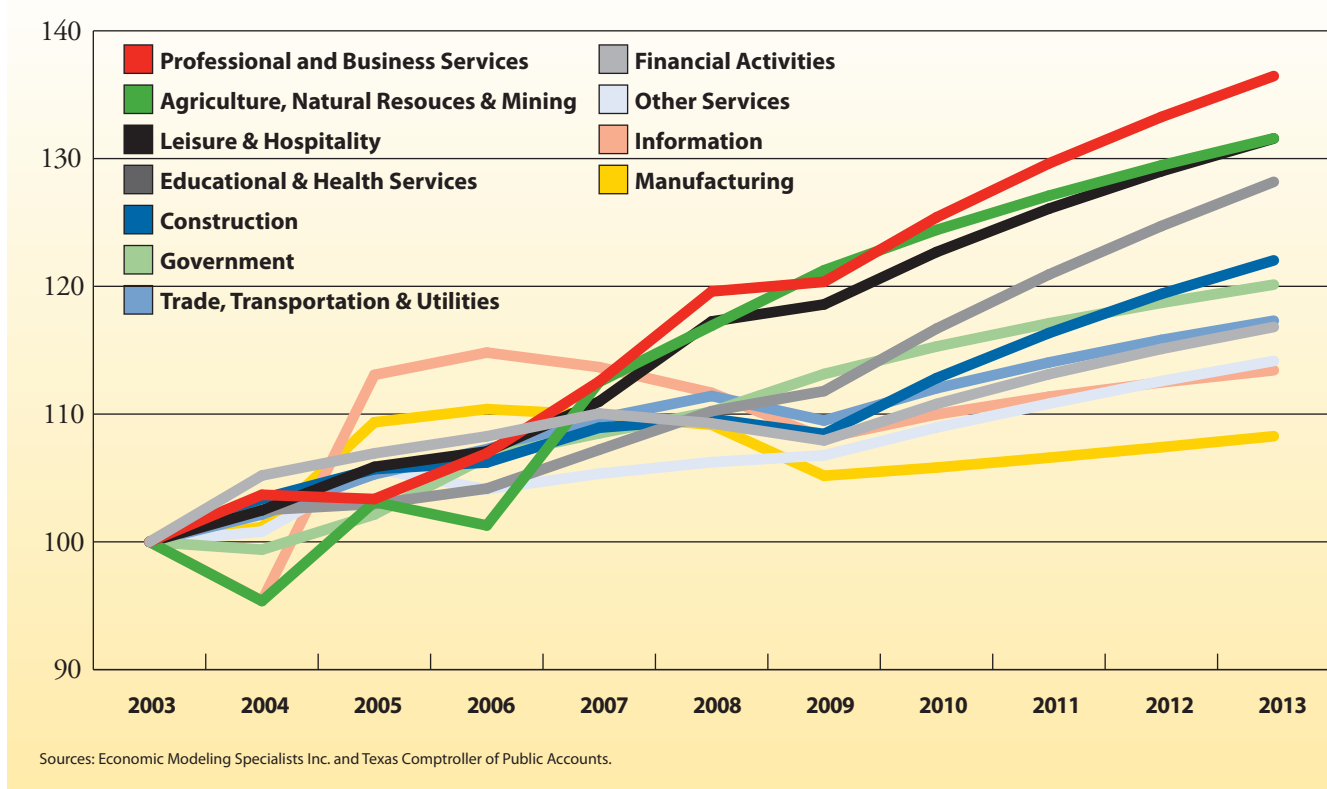
### Central Texas Region Employment Indices, 2003-2013



Source: Economic Modeling Specialists Inc.



Exhibit 3

**Industry Employment Projections, Central Texas Region, 2003-2013**

region's three metropolitan statistical areas (MSAs) and the non-metro counties. These expected changes are presented in the form of growth indices using 2003 as the base year, with an index equal to 100.

The region has experienced job growth similar to the state's growth, and should follow state trends through 2013. The employment growth rate in Central Texas should outpace Texas growth in 2009, with a projected decrease in Texas of less than 1 percent, while Central Texas is projected to grow less than 1 percent. Growth in the Bryan-College Station metro area should exceed the Texas growth rate in 2009 and continue outpacing the state through 2013. Non-metro counties in Central Texas are

projected to lose jobs in 2009, followed by projected job gains through 2013.

### Economic Trends

**Exhibit 3** provides a detailed picture of projected employment growth in Central Texas, displaying growth indices for various industries in the region, with 2003 as the base year. Employment for these industries is presented at the 11-industry "supersector" level of the North American Industry Classification System (NAICS).<sup>4</sup>

A supersector, as identified by a two-digit NAICS code, represents an aggregation of industries producing related goods and services. At this level, industries are classified into either goods-producing or service-producing



## Messina Hof Winery

Bryan's award-winning Messina Hof Winery and Resort was founded in 1977, and has since made a significant impact on the Bryan-College Station community, both economically and culturally. The Bonarrigos drew from their Sicilian and German heritages to create a romantic getaway that encompasses high-quality food, wine and lodging. The establishment's 100-acre property offers guests tranquil walks through the vineyards. Rooms at the Messina Hof Villa boast themes from romantic, mythical times and places. In addition, Messina Hof's on-site restaurant has been voted one of the top three restaurants in Texas.<sup>5</sup>

Messina Hof's economic impact on the community is undeniable. In 2005, resort founder Paul Bonarrigo served as chair of the Texas Wine Industry Development Advisory Committee, a committee that was newly formed under the direction of current Comptroller of Public Accounts Susan Combs, who was then Agriculture Commissioner. In June of 2008, Agriculture Commissioner Todd Staples celebrated the rapid growth of the state's wine industry by speaking at Messina Hof's kickoff event for the harvest season. Texas is the fifth largest wine producer in the nation, and the Texas Department of Agriculture estimates the industry's economic impact at \$1.35 billion for the year 2007 alone.<sup>6</sup>

Messina Hof hosts an annual harvest festival from mid-July to mid-August, during which visitors can participate in grape picking and stomping, the traditional first steps in the winemaking process. Guests at the festival also participate in dinners at the resort's restaurant, the Vintage House Restaurant. Messina Hof is the proud four-time winner of the Houston Livestock Show and Rodeo's "Top Texas Wine" award.<sup>7</sup>

*Overall, jobs in the Central Texas economy are expected to grow by 21 percent between 2003 and 2013.*

supersectors. The goods-producing group comprises three supersectors pertaining to natural resources and mining, construction and manufacturing. The service-producing group comprises seven supersectors providing services including Education and Health, Finance, Government, Information, Leisure and Hospitality, other Services and Trade, Transportation and Utilities.

All of the 11 supersectors in **Exhibit 3** should show positive growth between 2003 and 2013. Overall, jobs in the Central Texas economy are expected to grow by 21 percent during this period, despite the current national downturn.

Of the projections by period's end, three supersectors show steady expansion throughout the period. The Professional and Business Services sector should top all supersector growth with 36 percent more jobs in 2013 than 2003. The sector is projected to add

jobs each year to finish with 33,239 in 2013, led by Financial Support Services projected to add 1,589 jobs over the period. Engineering Services should lead all industries in the sector with 2,839 jobs in 2013.

Leisure and Hospitality is another supersector projected to add jobs each year, growing 32 percent from 2003 to 2013 to finish the period with 43,249 jobs. Most of this growth is attributable to its leading job industry, Limited Service Restaurants, which is projected to add 5,644 jobs by 2013.

The third supersector projected to add jobs each year is Education and Health Services. General Medical and Surgical Hospitals lead all industries in jobs and job growth throughout the period, projected to add 42 percent of supersector jobs by 2013 to finish with 17,658. Home Health Care Services should finish as the second largest industry with 7,526 jobs projected in 2013. Educational



industries as a group are projected to grow more modestly, led by Colleges, Universities and Professional Schools contributing 4 percent of supersector job growth by 2013.

Despite various industry downturns, other supersectors show strong projected job growth. At almost 32 percent, projected growth in the Agriculture, Natural Resources and Mining sector trails only growth in Professional and Business Services. This comes after strong rebounds from contractions in 2004 and 2006, and growth projected through the 2009 national recession.

Oil and Gas Support Activities should lead all supersector industries, contributing 72 percent job growth by 2013. Dimension Stone Mining and Quarrying should see large percentage gains, projected to finish with 280 jobs in 2013 from a start of only 11 jobs in 2003.

Government represents the largest regional supersector with 170,074 projected jobs in 2013. Government jobs should increase by 20 percent from 2003 to 2013, led by a projected job gain of 9,682 in State Government. Local Government accounts for more employment than any industry in the region with 60,222 jobs projected in 2013. Most of these Local Government jobs are in public schools. Except for a slight contraction in 2004, the supersector is projected to add jobs in each year of the 10-year period.

Other supersectors anticipating positive job growth rates over the period include Construction (22 percent); Trade, Transportation and Utilities (17 percent); Financial Activities (17 percent); Other Services (14 percent); Information (13 percent); and Manufacturing (8 percent).<sup>8</sup>

### Fairfield Industrial Park

Located in Freestone County, the Fairfield Industrial Development Corporation (FIDC) has built an industrial park facility on 30 acres of land located along I-45 within the city limits. Another 370 acres purchased a year ago will supplement the original acreage purchased in 1995. For the time being, development plans for the additional acreage include a 50-acre plot called phase 1A that will accommodate at least 10 companies, mostly from outside the region.

The four companies currently housed at the industrial park employ 46 people. These businesses rely on each other's goods and services. One company produces plastic tanks for water and chemical storage, while two others perform oil and gas chemical services, and a rental company provides event and business equipment.<sup>9</sup>

The city and its development corporation are considering housing, commercial, and retail developments to support the industrial expansion. However, city officials must carefully weigh any development projects against community concerns of local and historical preservation. Many Fairfield citizens take pride in their community's small town feel and enjoy, for example, a number of locally-owned retail establishments.<sup>10</sup>

### Blue Bell Ice Cream

Blue Bell Creameries opened its doors in 1907 in Brenham, TX. Previously known as the Brenham Creamery Company and originally started as a butter manufacturer, Blue Bell changed its name in 1930 to honor the area's Blue Bell wildflower. Blue Bell produces 50 different ice cream flavors and is sold in 17 states. The company's objective is to maintain its commitment to quality ingredients and a quality product at a fair price.<sup>11</sup> The company currently has some 2,900 employees and profits from "an estimated \$400 million in annual sales."<sup>12</sup>

Blue Bell offers a variety of ice cream-related products including sherbets, frozen yogurt, and ice cream with no sugar added, which is low in fat content. The company accepts recommendations for ice cream flavors from the public. Suggestions can be made through the "Comment" section of the Blue Bell Web site.<sup>13</sup> Week-day tours are available at the production facilities in Brenham. Blue Bell also ships ice cream to customers.<sup>14</sup>





## Economic Structure

Job growth depends upon a region's underlying economic structure. That structure includes multiple factors, including natural resources, labor force characteristics and the composition and concentration of the region's industries.

This latter characteristic, also called *clustering*, is particularly important since industry clusters give firms within them access to more suppliers and to skilled laborers with valuable knowledge and information.<sup>15</sup> The benefits that result from high industry concentrations give a region its competitive edge.<sup>16</sup>

One tool that can be used to identify industry concentration is the "location quotient." The location quotient identifies industry concentration by comparing the share of a region's economy attributable to a specific industry in comparison to the share that same industry accounts for in the nation's economy.

In essence, the share an industry accounts for in the national economy is seen as the "norm" for that industry, so comparing that norm with its share of a regional economy indicates whether that region tends to have "a lot" or "a little" of a particular industry. Typically, a region will contain "a lot" of industries

for which it has some natural or developed competitive advantage, based for instance on a local abundance of a particular resource, a favorable climate, an advantageous natural feature (such as proximity to a port), a highly educated labor force or some other factor.

A location quotient greater than one indicates a high regional employment concentration in an industry compared to the same industry at the national level. This means that the region is "specialized" in that particular industry. A location quotient of less than one indicates that the region's concentration in the industry is less than the national industry level. In essence, the region is *less* specialized in that given industry.

**Exhibit 4** lists industries in Central Texas region with location quotients exceeding two based on 2008 employment, meaning the region's share of employment in an industry is at least twice as large as the nation's share. These industries are grouped according to their respective NAICS supersectors and ranked from the highest to lowest location quotient within each supersector.<sup>17</sup>

Primary aluminum production manufacturing has the region's highest location

*(text continued on Page 14)*

## Toyota Processing Plant

Houston-based vehicle distributor Gulf States Toyota plans to expand its operations into Temple. Gulf States Toyota processes and transfers Toyota vehicles, parts and accessories to dealerships in Arkansas, Louisiana, Texas, Oklahoma and Mississippi. The company is investing \$50 million into buildings for the Temple plant that will allow for future expansion and modifications.<sup>18</sup> Once started, construction is scheduled to last 18 months. Gulf States plans to hire about 240 workers (220 in installation/logistics and 20 in management) for its Temple operation. The company hopes to hire up to 500 workers as the site's capacity expands.

Gulf States' primary reason for building in Temple was its infrastructure. The 305-acre site, located at Temple's Rail Park at Central Pointe, offers 24-hour rail service, a crucial factor in Gulf States' distribution operation. The company also cited Temple's trained work force, particularly retired military personnel with strong logistical skills.<sup>19</sup>



## Exhibit 4

**Central Texas Largest Industry Location Quotients, 2008*****Agriculture, Natural Resources and Mining***

| NAICS Code | Description                                   | 2008 Jobs | 2008 Location Quotient |
|------------|---|-----------|------------------------|
| 212325     | Clay, ceramic, and refractory minerals mining | 156       | 10.64                  |
| 212311     | Dimension stone mining and quarrying          | 197       | 7.27                   |
| 212111     | Bituminous coal and lignite surface mining    | 901       | 7.21                   |
| 212322     | Industrial sand mining                        | 71        | 5.18                   |
| 213112     | Support activities for oil and gas operations | 2,142     | 2.96                   |
| 212393     | Other chemical and fertilizer mineral mining  | 29        | 2.81                   |
| 212324     | Kaolin and ball clay mining                   | 27        | 2.77                   |
| 211112     | Natural gas liquid extraction                 | 38        | 2.21                   |

***Construction***

| NAICS Code | Description                         | 2008 Jobs | 2008 Location Quotient |
|------------|-------------------------------------|-----------|------------------------|
| 238142     | Nonresidential masonry contractors  | 814       | 2.33                   |
| 237120     | Oil and gas pipeline construction   | 745       | 2.14                   |
| 237110     | Water and sewer system construction | 1,267     | 2.00                   |

***Manufacturing***

| NAICS Code | Description  | 2008 Jobs | 2008 Location Quotient |
|------------|--|-----------|------------------------|
| 331312     | Primary aluminum production                          | 837       | 21.28                  |
| 326130     | Laminated plastics plate, sheet, and shapes          | 1,259     | 19.92                  |
| 322223     | Plastics, foil, and coated paper bag manufacturing   | 514       | 19.09                  |
| 337127     | Institutional furniture manufacturing                | 1,147     | 15.15                  |
| 333995     | Fluid power cylinder and actuator manufacturing      | 725       | 12.30                  |
| 327410     | Lime manufacturing                                   | 179       | 12.20                  |
| 321991     | Manufactured home, mobile home, manufacturing        | 1,196     | 10.36                  |
| 332996     | Fabricated pipe and pipe fitting manufacturing       | 913       | 8.84                   |
| 311520     | Ice cream and frozen dessert manufacturing           | 565       | 8.65                   |
| 327310     | Cement manufacturing                                 | 458       | 8.15                   |
| 315999     | All other accessory and apparel manufacturing        | 179       | 7.63                   |
| 336212     | Truck trailer manufacturing                          | 720       | 6.89                   |
| 339942     | Lead pencil and art good manufacturing               | 124       | 6.53                   |
| 313230     | Nonwoven fabric mills                                | 265       | 6.10                   |
| 311330     | Confectionery manufacturing from purchased chocolate | 671       | 6.01                   |
| 327213     | Glass container manufacturing                        | 330       | 5.92                   |
| 331492     | Secondary processing of other nonferrous             | 176       | 5.47                   |
| 335911     | Storage battery manufacturing                        | 236       | 4.81                   |
| 331513     | Steel foundries, except investment                   | 307       | 4.42                   |





Exhibit 4 (cont.)

**Central Texas Largest Industry Location Quotients, 2008**

| NAICS Code | Description  | 2008 Jobs | 2008 Location Quotient |
|------------|--|-----------|------------------------|
| 327991     | Cut stone and stone product manufacturing            | 430       | 4.31                   |
| 325520     | Adhesive manufacturing                               | 279       | 4.06                   |
| 337214     | Office furniture, except wood, manufacturing         | 331       | 3.80                   |
| 332722     | Bolt, nut, screw, rivet, and washer manufacturing    | 526       | 3.74                   |
| 327125     | Nonclay refractory manufacturing                     | 77        | 3.59                   |
| 333924     | Industrial truck, trailer, and stacker manufacturing | 280       | 3.57                   |
| 326140     | Polystyrene foam product manufacturing               | 331       | 3.49                   |
| 333132     | Oil and gas field machinery and equipment            | 697       | 3.40                   |
| 311615     | Poultry processing                                   | 2,619     | 3.32                   |
| 322291     | Sanitary paper product manufacturing                 | 349       | 3.32                   |
| 336214     | Travel trailer and camper manufacturing              | 401       | 3.17                   |
| 339944     | Carbon paper and inked ribbon manufacturing          | 17        | 3.17                   |
| 332111     | Iron and steel forging                               | 268       | 3.15                   |
| 325314     | Fertilizer, mixing only, manufacturing               | 84        | 3.09                   |
| 312111     | Soft drink manufacturing                             | 772       | 3.03                   |
| 332420     | Metal tank, heavy gauge, manufacturing               | 305       | 2.92                   |
| 334515     | Electricity and signal testing instruments           | 361       | 2.70                   |
| 334511     | Search, detection, and navigation instruments        | 1,274     | 2.52                   |
| 337910     | Mattress manufacturing                               | 211       | 2.43                   |
| 332321     | Metal window and door manufacturing                  | 543       | 2.42                   |
| 337110     | Wood kitchen cabinet and countertop manufacturing    | 1,184     | 2.42                   |
| 321214     | Truss manufacturing                                  | 258       | 2.40                   |
| 331521     | Aluminum die-casting foundries                       | 161       | 2.38                   |
| 333922     | Conveyor and conveying equipment manufacturing       | 232       | 2.34                   |
| 311999     | All other miscellaneous food manufacturing           | 190       | 2.20                   |
| 313210     | Broadwoven fabric mills                              | 257       | 2.17                   |
| 321918     | Other millwork, including flooring                   | 357       | 2.10                   |
| 314911     | Textile bag mills                                    | 54        | 2.09                   |

**Trade, Transportation and Utilities**

| NAICS Code | Description                                | 2008 Jobs | 2008 Location Quotient |
|------------|--|-----------|------------------------|
| 424520     | Livestock merchant wholesalers             | 496       | 7.37                   |
| 221111     | Hydroelectric power generation             | 868       | 6.93                   |
| 486110     | Pipeline transportation of crude oil       | 155       | 5.39                   |
| 488190     | Other support activities for air transport | 1,387     | 4.37                   |
| 493130     | Farm product warehousing and storage       | 96        | 3.31                   |



Exhibit 4 (cont.)

**Central Texas Largest Industry Location Quotients, 2008**

| NAICS Code | Description                                   | 2008 Jobs | 2008 Location Quotient |
|------------|---|-----------|------------------------|
| 423520     | Coal and other mineral merchant wholesalers   | 23        | 2.87                   |
| 424430     | Dairy product merchant wholesalers            | 372       | 2.83                   |
| 423140     | Used motor vehicle parts merchant wholesalers | 226       | 2.82                   |
| 424710     | Petroleum bulk stations and terminals         | 292       | 2.72                   |
| 221310     | Water supply and irrigation systems           | 318       | 2.56                   |
| 424410     | General line grocery merchant wholesalers     | 1,910     | 2.52                   |
| 424950     | Paint and supplies merchant wholesalers       | 189       | 2.27                   |
| 423130     | Tire and tube merchant wholesalers            | 151       | 2.03                   |

**Information**

| NAICS Code | Description                              | 2008 Jobs | 2008 Location Quotient |
|------------|--|-----------|------------------------|
| 517212     | Cellular and other wireless carriers     | 1,326     | 2.27                   |
| 515210     | Cable and other subscription programming | 572       | 2.08                   |

**Financial Activities**

| NAICS Code | Description                                   | 2008 Jobs | 2008 Location Quotient |
|------------|---|-----------|------------------------|
| 522294     | Secondary market financing                    | 684       | 10.48                  |
| 533110     | Lessors of nonfinancial intangible assets     | 434       | 4.41                   |
| 522298     | All other nondepository credit intermediation | 629       | 3.16                   |
| 531130     | Miniwarehouse and self-storage unit operators | 306       | 2.27                   |

**Professional and Business Services**

| NAICS Code | Description                           | 2008 Jobs | 2008 Location Quotient |
|------------|---------------------------------------|-----------|------------------------|
| 561210     | Facilities support services           | 2,081     | 4.73                   |
| 561622     | Locksmiths                            | 196       | 3.79                   |
| 561491     | Repossession services                 | 44        | 2.15                   |
| 541191     | Title abstract and settlement offices | 417       | 2.10                   |

**Educational and Health Services**

| NAICS Code | Description               | 2008 Jobs | 2008 Location Quotient |
|------------|---------------------------|-----------|------------------------|
| 62161      | Home health care services | 6,298     | 2.06                   |

**Leisure and Hospitality**

| NAICS Code | Description                 | 2008 Jobs | 2008 Location Quotient |
|------------|-----------------------------|-----------|------------------------|
| 721310     | Rooming and boarding houses | 88        | 2.61                   |

**Government**

| NAICS Code | Description                  | 2008 Jobs | 2008 Location Quotient |
|------------|------------------------------|-----------|------------------------|
| 912000     | Federal government, military | 52,238    | 7.76                   |
| 920000     | State government             | 37,889    | 2.19                   |

Source: Economic Modeling Specialists Inc.



quotient, with a measure of 21.28. In other words, the industry's level of employment in Central Texas is more than 21 times larger than its national counterpart.

### Most Competitive Industries

While location quotients provide important information on regional industry concentrations, they offer only a snapshot — a static measure at a particular point in time. To assess the competitive resilience of a regional industry, a more dynamic measure is needed. One such measure is “shift-share analysis.”

In this analysis, the change in an industry's regional presence is divided into three components: the portion attributable to the overall growth or decline in the nation's economy (the national growth effect); that attributable to the difference between the national trend for an industry and the national trend for all

industries (the industry mix effect); and that attributable to the region's competitiveness as a site for the industry (the regional competitiveness effect).

**Exhibit 5** lists the Central Texas region's most competitive industries based on shift-share analysis. The industries are ranked based on their employment change in the regional competitiveness component (and thus the industry's comparative advantage in the region) between 2002 and 2008.

Despite the fact that national military employment grew at a slower pace than the rest of the national economy (negative industry mix effect) this is not the case for the Central Texas Region. Due to the presence of Fort Hood, the most competitive industry in the region is the military, which increased by 7,359 jobs between 2002 and 2008.

*(text continued on Page 17)*

*The most competitive industry in the region is the military, which increased by 7,359 jobs between 2002 and 2008.*

Exhibit 5

#### Most Competitive Industries, Central Texas Region, 2008

| Rank | Description  | Super Sector                        | National Growth Effect | Industry Mix Effect | Regional Competitive Effect | Jobs Added |
|------|--|-------------------------------------|------------------------|---------------------|-----------------------------|------------|
| 1    | Federal government, military   | Government                          | 2,411                  | (3,616)             | 8,564                       | 7,359      |
| 2    | State government   | Government                          | 1,825                  | (451)               | 2,555                       | 3,929      |
| 3    | General medical and surgical hospitals   | Educational and Health Services     | 664                    | 411                 | 1,431                       | 2,505      |
| 4    | Navigational, measuring, electromedical, and control instruments manufacturing | Manufacturing                       | 27                     | (19)                | 1,333                       | 1,341      |
| 5    | Wireless telecommunications carriers   | Information                         | 12                     | (7)                 | 1,177                       | 1,183      |
| 6    | Department stores  | Trade, Transportation and Utilities | 166                    | (314)               | 1,097                       | 949        |
| 7    | General warehousing and storage  | Trade, Transportation and Utilities | 10                     | 42                  | 1,016                       | 1,068      |
| 8    | Limited-service eating places  | Leisure and Hospitality             | 789                    | 1,438               | 830                         | 3,056      |



## Exhibit 5 (cont.)

**Most Competitive Industries, Central Texas Region, 2008**

| Rank | Description  | Super Sector                              | National Growth Effect | Industry Mix Effect | Regional Competitive Effect | Jobs Added |
|------|--|---|------------------------|---------------------|-----------------------------|------------|
| 9    | Other nondepository credit intermediation            | Financial Activities                      | 91                     | (312)               | 793                         | 573        |
| 10   | Facilities support services                          | Professional and Business Services        | 56                     | 212                 | 762                         | 1,031      |
| 11   | Full-service restaurants                             | Leisure and Hospitality                   | 545                    | 821                 | 726                         | 2,092      |
| 12   | Site preparation contractors                         | Construction                              | 53                     | 82                  | 682                         | 817        |
| 13   | Commercial banking                                   | Financial Activities                      | 221                    | (3)                 | 598                         | 816        |
| 14   | Direct life and health insurance carriers            | Financial Activities                      | 36                     | (37)                | 563                         | 562        |
| 15   | Crop and animal production                           | Agriculture, Natural Resources and Mining | 232                    | (1,028)             | 492                         | (305)      |
| 16   | Other household and institutional furniture          | Manufacturing                             | 67                     | (425)               | 479                         | 122        |
| 17   | Motor vehicle body and trailer manufacturing         | Manufacturing                             | 41                     | (57)                | 443                         | 428        |
| 18   | Wood kitchen cabinet and countertop manufacturing    | Manufacturing                             | 41                     | (61)                | 442                         | 422        |
| 19   | All other general merchandise stores                 | Trade, Transportation and Utilities       | 46                     | (33)                | 431                         | 445        |
| 20   | New car dealers                                      | Trade, Transportation and Utilities       | 204                    | (456)               | 412                         | 159        |
| 21   | Mining and oil and gas field machinery manufacturing | Manufacturing                             | 12                     | 67                  | 408                         | 487        |
| 22   | All other fabricated metal product manufacturing     | Manufacturing                             | 32                     | (15)                | 405                         | 421        |
| 23   | Federal government, civilian, except postal service  | Government                                | 584                    | (253)               | 378                         | 709        |
| 24   | Collection agencies                                  | Professional and Business Services        | 5                      | (1)                 | 370                         | 374        |
| 25   | Oil and gas pipeline construction                    | Construction                              | 15                     | 111                 | 346                         | 472        |
| 26   | All other wood product manufacturing                 | Manufacturing                             | 55                     | (229)               | 346                         | 173        |
| 27   | Cement manufacturing                                 | Manufacturing                             | 6                      | (2)                 | 344                         | 349        |
| 28   | Hotels and motels, except casino hotels              | Leisure and Hospitality                   | 127                    | (11)                | 342                         | 458        |
| 29   | Pharmaceutical and medicine manufacturing            | Manufacturing                             | 21                     | (21)                | 340                         | 340        |
| 30   | Electrical contractors                               | Construction                              | 104                    | 16                  | 325                         | 444        |



## Exhibit 5 (cont.)

**Most Competitive Industries, Central Texas Region, 2008**

| Rank | Description                                    | Super Sector                        | National Growth Effect | Industry Mix Effect | Regional Competitive Effect | Jobs Added |
|------|--|-------------------------------------|------------------------|---------------------|-----------------------------|------------|
| 31   | Computer systems design and related services   | Professional and Business Services  | 73                     | 310                 | 325                         | 706        |
| 32   | Soft drink and ice manufacturing               | Manufacturing                       | 26                     | (47)                | 322                         | 301        |
| 33   | Engineering services                           | Professional and Business Services  | 97                     | 319                 | 316                         | 732        |
| 34   | Other specialized trucking, local              | Trade, Transportation and Utilities | 16                     | 0                   | 308                         | 324        |
| 35   | Water and sewer system construction            | Construction                        | 49                     | 8                   | 307                         | 363        |
| 36   | Commercial machinery repair and maintenance    | Other Services                      | 17                     | 55                  | 303                         | 375        |
| 37   | Dairy product merchant wholesalers             | Trade, Transportation and Utilities | 4                      | 2                   | 292                         | 297        |
| 38   | Postal service                                 | Trade, Transportation and Utilities | 109                    | (316)               | 286                         | 79         |
| 39   | Ambulance services                             | Educational and Health Services     | 13                     | 51                  | 273                         | 338        |
| 40   | Offices of physicians                          | Educational and Health Services     | 271                    | 412                 | 249                         | 932        |
| 41   | Office administrative services                 | Professional and Business Services  | 27                     | 129                 | 246                         | 402        |
| 42   | Educational support services                   | Educational and Health Services     | 10                     | 99                  | 245                         | 354        |
| 43   | Computer and software merchant wholesalers     | Trade, Transportation and Utilities | 10                     | (17)                | 226                         | 219        |
| 44   | Supermarkets and other grocery stores          | Trade, Transportation and Utilities | 337                    | (174)               | 222                         | 385        |
| 45   | Farm and garden equipment merchant wholesalers | Trade, Transportation and Utilities | 21                     | (16)                | 219                         | 225        |
| 46   | Plumbing and HVAC contractors                  | Construction                        | 149                    | 289                 | 216                         | 654        |
| 47   | Veterinary services                            | Professional and Business Services  | 43                     | 105                 | 216                         | 364        |
| 48   | Battery manufacturing                          | Manufacturing                       | 1                      | (3)                 | 211                         | 209        |
| 49   | Men's clothing stores                          | Trade, Transportation and Utilities | 4                      | (8)                 | 211                         | 208        |
| 50   | Real estate property managers                  | Financial Activities                | 27                     | 55                  | 208                         | 290        |

Sources: Economic Modeling Specialists Inc., Texas Workforce Commission, and Texas Comptroller of Public Accounts.



The general medical and surgical hospitals industry was the highest-ranked industry in which all three components of job growth increased. This industry grew by 2,505 jobs during this period, as local factors from the competitiveness effect contributed to 1,431 jobs, or 57 percent, of this increase. The remaining growth was due to a growing national economy and an industry growing faster than its national counterpart. Another similar example is the general warehousing and storage industry, in which local conditions contributed to 95 percent of job growth.

## Good Jobs for the Future

Shift-share analysis identifies the region's most competitive industries — those that

possess the best chances for increased employment opportunities. What types of occupations can Central Texans expect to find within these industries? **Exhibit 6** presents a list of “good jobs” for the region's future, grouping them based on their educational requirements.

For the purpose of this analysis, a “good job” is one for which the weighted average of median annual earnings, as reported by the Texas Workforce Commission, exceeds the state's 2007 per capita personal income level of \$37,187.<sup>20</sup> In the Central Texas region, 265 occupations pay more than this amount.

Occupations requiring doctoral and professional degrees command the highest annual

*(text continued on Page 28)*

Exhibit 6

### “Good Jobs,” Central Texas Region, 2008-2013

#### Doctoral and First Professional Degrees

| Occupation                                    | 2008 Jobs | 2013 Jobs | Total Job Openings | Growth | Replacement | 2008 Median Annual Earnings |
|---|-----------|-----------|--------------------|--------|-------------|-----------------------------|
| Physicians and surgeons                       | 2,374     | 2,717     | 560                | 343    | 217         | \$143,270                   |
| Dentists, general                             | 139       | 153       | 28                 | 14     | 14          | 141,898                     |
| Podiatrists                                   | 24        | 27        | 7                  | 3      | 4           | 119,538                     |
| Optometrists                                  | 97        | 110       | 21                 | 13     | 8           | 110,739                     |
| Pharmacists                                   | 647       | 763       | 174                | 116    | 58          | 103,563                     |
| Lawyers                                       | 621       | 703       | 142                | 82     | 60          | 94,890                      |
| Postsecondary teachers                        | 9,860     | 12,053    | 3,060              | 2,193  | 867         | 82,914                      |
| Audiologists                                  | 24        | 27        | 4                  | 3      | 1           | 73,154                      |
| Veterinarians                                 | 203       | 259       | 78                 | 56     | 22          | 67,496                      |
| Computer and information scientists, research | 21        | 25        | 7                  | 4      | 3           | 63,669                      |
| Biochemists and biophysicists                 | 12        | 14        | 3                  | 2      | 1           | 55,349                      |
| Astronomers                                   | 36        | 41        | 10                 | 5      | 5           | 52,770                      |
| Chiropractors                                 | 127       | 146       | 26                 | 19     | 7           | 51,750                      |
| Physicists                                    | 24        | 28        | 7                  | 4      | 3           | 51,002                      |



## Exhibit 6 (cont.)

**"Good Jobs," Central Texas Region, 2008-2013**

| Occupation  | 2008 Jobs     | 2013 Jobs     | Total Job Openings | Growth       | Replacement  | 2008 Median Annual Earnings |
|---|---------------|---------------|--------------------|--------------|--------------|-----------------------------|
| Clinical, counseling, and school psychologists    | 356           | 401           | 73                 | 45           | 28           | 46,696                      |
| Medical scientists, except epidemiologists        | 788           | 964           | 306                | 176          | 130          | 42,661                      |
| Microbiologists                                   | 18            | 20            | 4                  | 2            | 2            | 39,998                      |
| <b>Total</b>                                      | <b>15,371</b> | <b>18,451</b> | <b>4,510</b>       | <b>3,080</b> | <b>1,430</b> |                             |
| <b>Weighted Average of Median Annual Earnings</b> |               |               |                    |              |              | <b>\$90,758</b>             |

**Master's Degree**

| Occupation   | 2008 Jobs | 2013 Jobs | Total Job Openings | Growth | Replacement | 2008 Median Annual Earnings |
|--|-----------|-----------|--------------------|--------|-------------|-----------------------------|
| Operations research analysts                               | 92        | 100       | 17                 | 8      | 9           | \$75,400                    |
| Curators   | 35        | 41        | 14                 | 6      | 8           | 69,992                      |
| Occupational therapists                                    | 250       | 293       | 62                 | 43     | 19          | 69,451                      |
| Psychologists, all other                                   | 121       | 136       | 25                 | 15     | 10          | 67,350                      |
| Physical therapists  | 305       | 361       | 75                 | 56     | 19          | 67,101                      |
| Geoscientists, except hydrologists and geographers         | 209       | 239       | 58                 | 30     | 28          | 67,080                      |
| Statisticians  | 15        | 18        | 6                  | 3      | 3           | 61,256                      |
| Museum Technicians and Conservators                        | 27        | 31        | 10                 | 4      | 6           | 55,682                      |
| Hydrologists   | 36        | 40        | 9                  | 4      | 5           | 53,186                      |
| Counselors, all other                                      | 292       | 325       | 62                 | 33     | 29          | 50,794                      |
| Epidemiologists  | 18        | 21        | 6                  | 3      | 3           | 50,211                      |
| Environmental scientists and specialists, including health | 326       | 370       | 88                 | 44     | 44          | 48,110                      |
| Speech-language pathologists                               | 327       | 364       | 69                 | 37     | 32          | 47,757                      |
| Industrial-organizational psychologists                    | 24        | 28        | 6                  | 4      | 2           | 46,966                      |
| Educational, vocational, and school counselors             | 899       | 1,018     | 209                | 119    | 90          | 46,904                      |
| Urban and regional planners                                | 113       | 128       | 32                 | 15     | 17          | 46,488                      |
| Librarians   | 452       | 492       | 101                | 40     | 61          | 45,531                      |
| Instructional coordinators                                 | 513       | 617       | 140                | 104    | 36          | 45,115                      |
| Health educators   | 89        | 102       | 18                 | 13     | 5           | 42,307                      |
| Social scientists and related workers, all other           | 162       | 183       | 48                 | 21     | 27          | 42,162                      |
| Marriage and family therapists                             | 18        | 21        | 5                  | 3      | 2           | 41,246                      |





Exhibit 6 (cont.)

**“Good Jobs,” Central Texas Region, 2008-2013**

| Occupation  | 2008 Jobs    | 2013 Jobs    | Total Job Openings | Growth     | Replacement | 2008 Median Annual Earnings |
|---|--------------|--------------|--------------------|------------|-------------|-----------------------------|
| Economists  | 45           | 50           | 12                 | 5          | 7           | 38,917                      |
| Sociologists                                      | 12           | 13           | 2                  | 1          | 1           | 38,584                      |
| Mental health and substance abuse social workers  | 114          | 131          | 29                 | 17         | 12          | 37,814                      |
| <b>Total</b>                                      | <b>4,494</b> | <b>5,122</b> | <b>1,103.</b>      | <b>628</b> | <b>475</b>  |                             |
| <b>Weighted Average of Median Annual Earnings</b> |              |              |                    |            |             | <b>\$51,378</b>             |

**Degree Plus Work Experience**

| Occupation  | 2008 Jobs | 2013 Jobs | Total Job Openings | Growth | Replacement | 2008 Median Annual Earnings |
|---|-----------|-----------|--------------------|--------|-------------|-----------------------------|
| Natural sciences managers                                 | 64        | 72        | 15                 | 8      | 7           | \$118,914                   |
| Engineering managers                                      | 213       | 235       | 44                 | 22     | 22          | 117,541                     |
| Human resources managers, all other                       | 44        | 49        | 9                  | 5      | 4           | 110,240                     |
| Marketing managers  | 137       | 152       | 30                 | 15     | 15          | 106,704                     |
| Chief executives  | 536       | 565       | 102                | 29     | 73          | 101,400                     |
| Compensation and benefits managers                        | 91        | 100       | 18                 | 9      | 9           | 89,856                      |
| Public relations managers                                 | 78        | 87        | 18                 | 9      | 9           | 89,648                      |
| Training and development managers                         | 45        | 51        | 10                 | 6      | 4           | 89,606                      |
| Computer and information systems managers                 | 243       | 274       | 51                 | 31     | 20          | 89,378                      |
| Sales managers  | 419       | 445       | 72                 | 26     | 46          | 82,909                      |
| Actuaries   | 21        | 24        | 7                  | 3      | 4           | 81,973                      |
| Purchasing managers                                       | 86        | 91        | 17                 | 5      | 12          | 81,598                      |
| Education administrators, postsecondary                   | 166       | 193       | 51                 | 27     | 24          | 75,358                      |
| Advertising and promotions managers                       | 29        | 31        | 5                  | 2      | 3           | 74,797                      |
| Financial managers  | 629       | 687       | 104                | 58     | 46          | 73,570                      |
| General and operations managers                           | 5,383     | 5,667     | 928                | 284    | 644         | 70,533                      |
| Medical and health services managers                      | 697       | 791       | 161                | 94     | 67          | 64,626                      |
| Education administrators, elementary and secondary school | 978       | 1,074     | 232                | 96     | 136         | 61,291                      |
| Administrative services managers                          | 1,016     | 1,121     | 241                | 105    | 136         | 59,717                      |
| Arbitrators, mediators, and conciliators                  | 19        | 21        | 4                  | 2      | 2           | 51,979                      |
| Management analysts                                       | 557       | 647       | 139                | 90     | 49          | 51,397                      |
| Vocational education teachers, secondary school           | 591       | 614       | 123                | 23     | 100         | 43,043                      |



Exhibit 6 (cont.)

**“Good Jobs,” Central Texas Region, 2008-2013**

| Occupation  | 2008 Jobs     | 2013 Jobs     | Total Job Openings | Growth     | Replacement  | 2008 Median Annual Earnings |
|---|---------------|---------------|--------------------|------------|--------------|-----------------------------|
| Vocational education teachers, middle school      | 57            | 59            | 10                 | 2          | 8            | 41,650                      |
| Education administrators, all other               | 41            | 48            | 13                 | 7          | 6            | 38,564                      |
| <b>Total</b>                                      | <b>12,140</b> | <b>13,098</b> | <b>2,404</b>       | <b>958</b> | <b>1,446</b> |                             |
| <b>Weighted Average of Median Annual Earnings</b> |               |               |                    |            |              | <b>\$70,524</b>             |

**Bachelor's Degree**

| Occupation   | 2008 Jobs | 2013 Jobs | Total Job Openings | Growth | Replacement | 2008 Median Annual Earnings |
|--|-----------|-----------|--------------------|--------|-------------|-----------------------------|
| Petroleum engineers  | 370       | 423       | 103                | 53     | 50          | \$119,142                   |
| Airline pilots, copilots, and flight engineers                             | 196       | 217       | 50                 | 21     | 29          | 112,778                     |
| Computer hardware engineers  | 17        | 19        | 5                  | 2      | 3           | 107,723                     |
| Aerospace engineers  | 96        | 107       | 21                 | 11     | 10          | 104,957                     |
| Engineers, all other   | 99        | 108       | 15                 | 9      | 6           | 90,813                      |
| Orthotists and prosthetists  | 28        | 32        | 5                  | 4      | 1           | 86,674                      |
| Mining and geological engineers, including mining safety engineers         | 15        | 17        | 4                  | 2      | 2           | 80,850                      |
| Physician assistants   | 203       | 242       | 53                 | 39     | 14          | 80,725                      |
| Sales engineers  | 175       | 189       | 36                 | 14     | 22          | 80,454                      |
| Health diagnosing and treating practitioners, all other                    | 112       | 129       | 27                 | 17     | 10          | 80,101                      |
| Chemical engineers   | 51        | 59        | 15                 | 8      | 7           | 77,875                      |
| Industrial engineers   | 291       | 337       | 81                 | 46     | 35          | 77,314                      |
| Health and safety engineers, except mining safety engineers and inspectors | 80        | 89        | 19                 | 9      | 10          | 75,400                      |
| Materials engineers  | 82        | 89        | 17                 | 7      | 10          | 74,589                      |
| Computer software engineers, applications                                  | 408       | 515       | 138                | 107    | 31          | 73,237                      |
| Financial analysts   | 288       | 338       | 58                 | 50     | 8           | 72,114                      |
| Physical scientists, all other   | 26        | 29        | 6                  | 3      | 3           | 71,157                      |
| Electrical engineers   | 249       | 272       | 52                 | 23     | 29          | 65,187                      |
| Electronics engineers, except computer                                     | 207       | 224       | 42                 | 17     | 25          | 65,083                      |
| Computer software engineers, systems software                              | 456       | 550       | 128                | 94     | 34          | 63,773                      |
| Financial examiners  | 14        | 15        | 2                  | 1      | 1           | 62,941                      |
| Materials scientists   | 98        | 119       | 35                 | 21     | 14          | 62,317                      |



Exhibit 6 (cont.)

**“Good Jobs,” Central Texas Region, 2008-2013**

| Occupation  | 2008 Jobs | 2013 Jobs | Total Job Openings | Growth | Replacement | 2008 Median Annual Earnings |
|---|-----------|-----------|--------------------|--------|-------------|-----------------------------|
| Mechanical engineers  | 348       | 376       | 66                 | 28     | 38          | 61,630                      |
| Medical and clinical laboratory technologists                         | 1,215     | 1,397     | 278                | 182    | 96          | 60,840                      |
| Environmental engineers   | 80        | 91        | 23                 | 11     | 12          | 59,030                      |
| Landscape architects  | 20        | 23        | 5                  | 3      | 2           | 57,907                      |
| Civil engineers   | 826       | 927       | 212                | 101    | 111         | 57,699                      |
| Database administrators   | 323       | 384       | 79                 | 61     | 18          | 57,512                      |
| Dietitians and nutritionists  | 177       | 194       | 40                 | 17     | 23          | 57,325                      |
| Logisticians  | 337       | 398       | 88                 | 61     | 27          | 57,138                      |
| Athletic trainers   | 94        | 110       | 25                 | 16     | 9           | 56,950                      |
| Therapists, all other   | 24        | 27        | 4                  | 3      | 1           | 56,243                      |
| Securities, commodities, and financial services sales agents          | 194       | 211       | 41                 | 17     | 24          | 55,182                      |
| Occupational health and safety specialists                            | 135       | 153       | 31                 | 18     | 13          | 54,787                      |
| Budget analysts   | 178       | 199       | 42                 | 21     | 21          | 54,704                      |
| Computer programmers  | 640       | 663       | 103                | 23     | 80          | 54,704                      |
| Business operation specialists, all other                             | 2,455     | 2,880     | 562                | 425    | 137         | 54,558                      |
| Commercial and industrial designers                                   | 14        | 14        | 2                  | 0      | 2           | 54,558                      |
| Computer systems analysts   | 979       | 1,169     | 324                | 190    | 134         | 54,538                      |
| Writers and authors   | 28        | 31        | 6                  | 3      | 3           | 54,267                      |
| Network and computer systems administrators                           | 809       | 949       | 234                | 140    | 94          | 53,435                      |
| Insurance underwriters  | 88        | 90        | 14                 | 2      | 12          | 53,290                      |
| Technical writers   | 48        | 54        | 13                 | 6      | 7           | 52,915                      |
| Kindergarten teachers, except special education                       | 739       | 844       | 166                | 105    | 61          | 52,541                      |
| Set and exhibit designers   | 18        | 20        | 4                  | 2      | 2           | 51,813                      |
| Soil and plant Scientists   | 32        | 36        | 9                  | 4      | 5           | 51,605                      |
| Chemists  | 150       | 175       | 46                 | 25     | 21          | 51,147                      |
| Architects, except landscape and naval                                | 114       | 127       | 24                 | 13     | 11          | 50,898                      |
| Personal financial advisors   | 129       | 154       | 31                 | 25     | 6           | 50,710                      |
| Human resources, training, and labor relations specialists, all other | 218       | 252       | 58                 | 34     | 24          | 50,523                      |
| Zoologists and wildlife biologists                                    | 30        | 34        | 7                  | 4      | 3           | 49,754                      |
| Food scientists and technologists                                     | 56        | 64        | 17                 | 8      | 9           | 48,776                      |
| Construction managers   | 1,062     | 1,172     | 192                | 110    | 82          | 48,131                      |



Exhibit 6 (cont.)

**“Good Jobs,” Central Texas Region, 2008-2013**

| Occupation   | 2008 Jobs | 2013 Jobs | Total Job Openings | Growth | Replacement | 2008 Median Annual Earnings |
|--|-----------|-----------|--------------------|--------|-------------|-----------------------------|
| Credit analysts  | 95        | 96        | 18                 | 1      | 17          | 47,382                      |
| Biological scientists, all other   | 130       | 146       | 30                 | 16     | 14          | 47,320                      |
| Education, training, and library workers, all other                        | 91        | 104       | 19                 | 13     | 6           | 47,154                      |
| Compensation, benefits, and job analysis specialists                       | 271       | 306       | 65                 | 35     | 30          | 47,070                      |
| Multi-media artists and animators  | 51        | 63        | 18                 | 12     | 6           | 47,029                      |
| Accountants and auditors   | 2,402     | 2,662     | 470                | 260    | 210         | 46,925                      |
| Loan officers  | 891       | 923       | 78                 | 32     | 46          | 46,862                      |
| Public relations specialists   | 361       | 405       | 58                 | 44     | 14          | 46,550                      |
| Training and development specialists                                       | 500       | 569       | 123                | 69     | 54          | 46,280                      |
| Legal support workers, all other   | 33        | 36        | 6                  | 3      | 3           | 45,802                      |
| Surveyors  | 139       | 160       | 43                 | 21     | 22          | 45,552                      |
| Adult literacy, remedial education, and GED teachers and instructors       | 283       | 327       | 60                 | 44     | 16          | 45,198                      |
| Animal scientists  | 143       | 164       | 44                 | 21     | 23          | 44,491                      |
| Secondary school teachers, except special and vocational education         | 4,192     | 4,546     | 973                | 354    | 619         | 42,278                      |
| Film and video editors   | 14        | 15        | 2                  | 1      | 1           | 41,933                      |
| Network systems and data communications analysts                           | 318       | 419       | 135                | 101    | 34          | 41,850                      |
| Social and community service managers                                      | 207       | 231       | 44                 | 24     | 20          | 41,600                      |
| Social workers, all other  | 275       | 310       | 65                 | 35     | 30          | 40,976                      |
| Middle school teachers, except special and vocational education            | 3,388     | 3,773     | 753                | 385    | 368         | 40,570                      |
| Special education teachers, secondary school                               | 278       | 305       | 58                 | 27     | 31          | 40,389                      |
| Special education teachers, preschool, kindergarten, and elementary school | 598       | 693       | 162                | 95     | 67          | 40,176                      |
| Medical and public health social workers                                   | 271       | 309       | 67                 | 38     | 29          | 39,894                      |
| Elementary school teachers, except special education                       | 6,113     | 6,896     | 1,450              | 783    | 667         | 39,810                      |
| Conservation scientists  | 58        | 64        | 15                 | 6      | 9           | 39,707                      |
| Financial specialists, all other   | 91        | 101       | 22                 | 10     | 12          | 39,582                      |
| Special education teachers, middle school                                  | 294       | 335       | 74                 | 41     | 33          | 39,322                      |



Exhibit 6 (cont.)

**“Good Jobs,” Central Texas Region, 2008-2013**

| Occupation  | 2008 Jobs     | 2013 Jobs     | Total Job Openings | Growth       | Replacement  | 2008 Median Annual Earnings |
|---|---------------|---------------|--------------------|--------------|--------------|-----------------------------|
| Insurance sales agents                                    | 409           | 424           | 58                 | 15           | 43           | 38,979                      |
| Meeting and convention planners                           | 62            | 71            | 15                 | 9            | 6            | 38,147                      |
| Employment, recruitment, and placement specialists        | 451           | 495           | 91                 | 44           | 47           | 38,064                      |
| Life scientists, all other                                | 19            | 21            | 5                  | 2            | 3            | 37,939                      |
| Probation officers and correctional treatment specialists | 298           | 339           | 58                 | 41           | 17           | 37,794                      |
| <b>Total</b>  | <b>37,847</b> | <b>42,645</b> | <b>8,737</b>       | <b>4,798</b> | <b>3,939</b> |                             |
| <b>Weighted Average of Median Annual Earnings</b>         |               |               |                    |              |              | <b>\$49,559</b>             |

**Associate Degree**

| Occupation  | 2008 Jobs | 2013 Jobs | Total Job Openings | Growth | Replacement | 2008 Median Annual Earnings |
|---|-----------|-----------|--------------------|--------|-------------|-----------------------------|
| Diagnostic medical sonographers                   | 127       | 152       | 34                 | 25     | 9           | \$85,842                    |
| Nuclear medicine technologists                    | 67        | 79        | 17                 | 12     | 5           | 68,598                      |
| Computer specialists, all other                   | 241       | 274       | 65                 | 33     | 32          | 65,333                      |
| Dental hygienists                                 | 344       | 412       | 102                | 68     | 34          | 63,315                      |
| Respiratory therapists                            | 452       | 554       | 137                | 102    | 35          | 62,109                      |
| Mechanical engineering technicians                | 181       | 199       | 36                 | 18     | 18          | 55,827                      |
| Registered nurses                                 | 7,646     | 8,980     | 1,984              | 1,334  | 650         | 54,621                      |
| Physical therapist assistants                     | 146       | 178       | 42                 | 32     | 10          | 53,352                      |
| Electro-mechanical technicians                    | 24        | 25        | 3                  | 1      | 2           | 50,794                      |
| Funeral directors                                 | 90        | 101       | 22                 | 11     | 11          | 49,733                      |
| Respiratory therapy technicians                   | 160       | 180       | 45                 | 20     | 25          | 49,608                      |
| Cardiovascular technologists and technicians      | 168       | 209       | 53                 | 41     | 12          | 48,547                      |
| Electrical and electronic engineering technicians | 404       | 440       | 76                 | 36     | 40          | 46,987                      |
| Industrial engineering technicians                | 155       | 167       | 27                 | 12     | 15          | 43,430                      |
| Radiologic technologists and technicians          | 714       | 823       | 159                | 109    | 50          | 43,139                      |
| Interior designers                                | 45        | 49        | 10                 | 4      | 6           | 42,307                      |
| Occupational therapist assistants                 | 61        | 70        | 14                 | 9      | 5           | 41,018                      |
| Fish and game wardens                             | 14        | 16        | 4                  | 2      | 2           | 40,040                      |
| Social science research assistants                | 70        | 82        | 26                 | 12     | 14          | 39,437                      |
| Medical and clinical laboratory technicians       | 1,149     | 1,348     | 289                | 199    | 90          | 38,771                      |



Exhibit 6 (cont.)

**"Good Jobs," Central Texas Region, 2008-2013**

| Occupation  | 2008 Jobs     | 2013 Jobs     | Total Job Openings | Growth       | Replacement  | 2008 Median Annual Earnings |
|---|---------------|---------------|--------------------|--------------|--------------|-----------------------------|
| Computer support specialists                      | 1,522         | 1,702         | 419                | 180          | 239          | 37,606                      |
| Semiconductor processors                          | 89            | 104           | 29                 | 15           | 14           | 37,315                      |
| <b>Total</b>                                      | <b>13,869</b> | <b>16,144</b> | <b>3,593</b>       | <b>2,275</b> | <b>1,318</b> |                             |
| <b>Weighted Average of Median Annual Earnings</b> |               |               |                    |              |              | <b>\$51,032</b>             |

**Postsecondary Vocational Award**

| Occupation  | 2008 Jobs    | 2013 Jobs    | Total Job Openings | Growth     | Replacement | 2008 Median Annual Earnings |
|---|--------------|--------------|--------------------|------------|-------------|-----------------------------|
| Commercial pilots   | 64           | 74           | 19                 | 10         | 9           | \$64,418                    |
| Electrical and electronics repairers, powerhouse, substation, and relay       | 86           | 78           | 7                  | -8         | 15          | 57,325                      |
| Ship engineers  | 25           | 28           | 6                  | 3          | 3           | 49,296                      |
| Aircraft mechanics and service technicians                                    | 439          | 494          | 77                 | 55         | 22          | 48,194                      |
| Electrical and electronics drafters   | 77           | 82           | 16                 | 5          | 11          | 47,133                      |
| Avionics technicians  | 64           | 70           | 9                  | 6          | 3           | 46,072                      |
| Mechanical drafters   | 188          | 199          | 37                 | 11         | 26          | 44,304                      |
| Appraisers and assessors of real estate                                       | 178          | 199          | 39                 | 21         | 18          | 44,200                      |
| Electrical and electronics repairers, commercial and industrial equipment     | 293          | 334          | 93                 | 41         | 52          | 42,931                      |
| Electrical and electronics installers and repairers, transportation equipment | 72           | 75           | 11                 | 3          | 8           | 40,893                      |
| Healthcare practitioners and technical workers, all other                     | 122          | 140          | 30                 | 18         | 12          | 40,456                      |
| Healthcare technologists and technicians, all other                           | 282          | 327          | 57                 | 45         | 12          | 39,312                      |
| <b>Total</b>  | <b>1,890</b> | <b>2,100</b> | <b>401</b>         | <b>210</b> | <b>191</b>  |                             |
| <b>Weighted Average of Median Annual Earnings</b>                             |              |              |                    |            |             | <b>\$45,376</b>             |

**Long-term On-the-job Training**

| Occupation                         | 2008 Jobs | 2013 Jobs | Total Job Openings | Growth | Replacement | 2008 Median Annual Earnings |
|------------------------------------|-----------|-----------|--------------------|--------|-------------|-----------------------------|
| Air traffic controllers            | 73        | 85        | 23                 | 12     | 11          | \$85,738                    |
| Transit and railroad police        | 22        | 23        | 4                  | 1      | 3           | 73,778                      |
| Power distributors and dispatchers | 32        | 30        | 4                  | -2     | 6           | 59,987                      |



Exhibit 6 (cont.)

**“Good Jobs,” Central Texas Region, 2008-2013**

| Occupation   | 2008 Jobs     | 2013 Jobs     | Total Job Openings | Growth       | Replacement  | 2008 Median Annual Earnings |
|--|---------------|---------------|--------------------|--------------|--------------|-----------------------------|
| Chemical plant and system operators  | 110           | 132           | 46                 | 22           | 24           | 59,779                      |
| Gas plant operators  | 160           | 163           | 32                 | 3            | 29           | 56,763                      |
| Claims adjusters, examiners, and investigators   | 1,053         | 1,118         | 201                | 65           | 136          | 54,579                      |
| Telecommunications equipment installers and repairers, except line installers                | 394           | 400           | 53                 | 6            | 47           | 51,813                      |
| Power plant operators  | 136           | 130           | 16                 | -6           | 22           | 51,334                      |
| Boilermakers   | 60            | 67            | 18                 | 7            | 11           | 50,731                      |
| Elevator installers and repairers  | 46            | 45            | 5                  | -1           | 6            | 49,046                      |
| Petroleum pump system operators, refinery operators, and gaugers                             | 172           | 185           | 48                 | 13           | 35           | 47,486                      |
| Telecommunications line installers and repairers   | 348           | 321           | 15                 | -27          | 42           | 46,862                      |
| Plant and system operators, all other  | 20            | 22            | 5                  | 2            | 3            | 46,530                      |
| Numerical tool and process control programmers   | 26            | 26            | 3                  | 0            | 3            | 44,304                      |
| Fire fighters  | 1,081         | 1,227         | 345                | 146          | 199          | 43,826                      |
| Compliance officers, except agriculture, construction, health and safety, and transportation | 304           | 336           | 50                 | 32           | 18           | 42,806                      |
| Military Occupations   | 52,238        | 53,323        | 7,420              | 1,085        | 6,335        | 42,432                      |
| Rail car repairers   | 108           | 113           | 16                 | 5            | 11           | 41,642                      |
| Coaches and scouts   | 396           | 454           | 109                | 58           | 51           | 41,163                      |
| Media and communication workers, all other   | 16            | 18            | 4                  | 2            | 2            | 41,018                      |
| Millwrights  | 108           | 113           | 12                 | 5            | 7            | 39,978                      |
| Stationary engineers and boiler operators  | 167           | 183           | 30                 | 16           | 14           | 39,915                      |
| Athletes and sports competitors  | 11            | 11            | 1                  | 0            | 1            | 38,958                      |
| Brickmasons and blockmasons  | 323           | 321           | 30                 | -2           | 32           | 38,917                      |
| Aircraft structure, surfaces, rigging, and systems assemblers                                | 121           | 130           | 21                 | 9            | 12           | 38,542                      |
| Police and sheriff's patrol officers   | 2,421         | 2,733         | 639                | 312          | 327          | 38,438                      |
| Interpreters and translators   | 77            | 91            | 23                 | 14           | 9            | 37,794                      |
| Plumbers, pipefitters, and steamfitters  | 886           | 973           | 176                | 87           | 89           | 37,669                      |
| Audio and video equipment technicians  | 34            | 39            | 11                 | 5            | 6            | 37,627                      |
| <b>Total</b>   | <b>60,943</b> | <b>62,812</b> | <b>9,360</b>       | <b>1,869</b> | <b>7,491</b> |                             |
| <b>Weighted Average of Median Annual Earnings</b>  |               |               |                    |              |              | <b>\$42,661</b>             |





Exhibit 6 (cont.)

**“Good Jobs,” Central Texas Region, 2008-2013**

***Moderate-term On-the-job Training***

| Occupation   | 2008 Jobs    | 2013 Jobs    | Total Job Openings | Growth     | Replacement | 2008 Median Annual Earnings |
|--|--------------|--------------|--------------------|------------|-------------|-----------------------------|
| Railroad conductors and yardmasters  | 77           | 84           | 22                 | 7          | 15          | \$76,107                    |
| Locomotive engineers and operators   | 156          | 164          | 35                 | 8          | 27          | 62,234                      |
| Sales representatives, wholesale and manufacturing, technical and scientific products        | 562          | 601          | 99                 | 39         | 60          | 57,366                      |
| Signal and track switch repairers  | 20           | 19           | 0                  | -1         | 1           | 55,390                      |
| Precision instrument and equipment repairers, all other                                      | 71           | 79           | 18                 | 8          | 10          | 55,203                      |
| Chemical equipment operators and tenders   | 115          | 137          | 37                 | 22         | 15          | 51,210                      |
| Audio-visual collections specialists   | 72           | 73           | 11                 | 1          | 10          | 46,010                      |
| Gas compressor and gas pumping station operators   | 12           | 13           | 4                  | 1          | 3           | 45,822                      |
| Media and communication equipment workers, all other   | 13           | 14           | 3                  | 1          | 2           | 45,614                      |
| Sales representatives, services, all other   | 725          | 839          | 200                | 114        | 86          | 44,949                      |
| Railroad brake, signal, and switch operators   | 94           | 90           | 17                 | -4         | 21          | 44,034                      |
| Pump operators, except wellhead pumpers  | 22           | 24           | 8                  | 2          | 6           | 43,930                      |
| Explosives workers, ordnance handling experts, and blasters                                  | 16           | 19           | 5                  | 3          | 2           | 41,995                      |
| Control and valve installers and repairers, except mechanical door                           | 311          | 330          | 46                 | 19         | 27          | 41,704                      |
| Wellhead pumpers   | 27           | 32           | 13                 | 5          | 8           | 41,205                      |
| Sales representatives, wholesale and manufacturing, except technical and scientific products | 3,713        | 3,804        | 477                | 91         | 386         | 39,998                      |
| Derrick operators, oil and gas   | 84           | 105          | 28                 | 21         | 7           | 39,603                      |
| Bailiffs   | 36           | 41           | 9                  | 5          | 4           | 39,478                      |
| Extraction workers, all other  | 42           | 52           | 16                 | 10         | 6           | 39,416                      |
| Metal workers and plastic workers, all other   | 38           | 33           | 2                  | -5         | 7           | 38,376                      |
| Pourers and casters, metal   | 215          | 180          | -3                 | -35        | 32          | 37,606                      |
| <b>Total</b>   | <b>6,421</b> | <b>6,733</b> | <b>1,047</b>       | <b>312</b> | <b>735</b>  |                             |
| <b>Weighted Average of Median Annual Earnings</b>  |              |              |                    |            |             | <b>\$43,621</b>             |



Exhibit 6 (cont.)

**“Good Jobs,” Central Texas Region, 2008-2013****Short-term On-the-job Training**

| Occupation  | 2008 Jobs    | 2013 Jobs    | Total Job Openings | Growth    | Replacement | 2008 Median Annual Earnings |
|---|--------------|--------------|--------------------|-----------|-------------|-----------------------------|
| Parking enforcement workers   | 13           | 15           | 4                  | 2         | 2           | \$44,512                    |
| Postal service clerks   | 250          | 265          | 44                 | 15        | 29          | 44,429                      |
| Postal service mail carriers  | 1,103        | 1,168        | 230                | 65        | 165         | 43,659                      |
| Postal service mail sorters, processors, and processing machine operators | 447          | 441          | 36                 | -6        | 42          | 41,122                      |
| Riggers   | 59           | 62           | 5                  | 3         | 2           | 39,499                      |
| Traffic technicians   | 23           | 26           | 5                  | 3         | 2           | 39,125                      |
| <b>Total</b>  | <b>1,895</b> | <b>1,977</b> | <b>324</b>         | <b>82</b> | <b>242</b>  |                             |
| <b>Weighted Average of Median Annual Earnings</b>                         |              |              |                    |           |             | <b>\$42,983</b>             |

**Work Experience in a Related Field**

| Occupation  | 2008 Jobs | 2013 Jobs | Total Job Openings | Growth | Replacement | 2008 Median Annual Earnings |
|---|-----------|-----------|--------------------|--------|-------------|-----------------------------|
| Managers, all other   | 436       | 487       | 96                 | 51     | 45          | \$78,686                    |
| Real estate brokers   | 58        | 67        | 14                 | 9      | 5           | 77,168                      |
| Industrial production managers  | 343       | 350       | 74                 | 7      | 67          | 76,086                      |
| Fire inspectors and investigators   | 18        | 20        | 4                  | 2      | 2           | 70,699                      |
| First-line supervisors/managers of fire fighting and prevention workers                             | 33        | 37        | 9                  | 4      | 5           | 66,248                      |
| Captains, mates, and pilots of water vessels  | 47        | 52        | 11                 | 5      | 6           | 63,232                      |
| Postmasters and mail superintendents  | 119       | 125       | 21                 | 6      | 15          | 60,882                      |
| First-line supervisors/managers of police and detectives  | 127       | 142       | 35                 | 15     | 20          | 57,658                      |
| Detectives and criminal investigators   | 299       | 351       | 86                 | 52     | 34          | 55,661                      |
| Transportation, storage, and distribution managers  | 251       | 269       | 55                 | 18     | 37          | 55,099                      |
| First-line supervisors/managers of non-retail sales workers   | 502       | 512       | 45                 | 10     | 35          | 54,725                      |
| Private detectives and investigators  | 93        | 103       | 19                 | 10     | 9           | 53,102                      |
| First-line supervisors/managers, protective service workers, all other                              | 48        | 55        | 11                 | 7      | 4           | 50,835                      |
| First-line supervisors/managers of transportation and material-moving machine and vehicle operators | 486       | 525       | 88                 | 39     | 49          | 49,358                      |



Exhibit 6 (cont.)

**“Good Jobs,” Central Texas Region, 2008-2013**

| Occupation  | 2008 Jobs     | 2013 Jobs     | Total Job Openings | Growth       | Replacement  | 2008 Median Annual Earnings |
|---|---------------|---------------|--------------------|--------------|--------------|-----------------------------|
| First-line supervisors/managers of mechanics, installers, and repairers       | 1,375         | 1,467         | 251                | 92           | 159          | 49,192                      |
| Wholesale and retail buyers, except farm products                             | 208           | 210           | 25                 | 2            | 23           | 48,776                      |
| First-line supervisors/managers of construction trades and extraction workers | 1,348         | 1,505         | 251                | 157          | 94           | 48,256                      |
| Purchasing agents, except wholesale, retail, and farm products                | 661           | 696           | 106                | 35           | 71           | 46,530                      |
| Food service managers   | 566           | 614           | 115                | 48           | 67           | 45,531                      |
| Lodging managers  | 104           | 121           | 29                 | 17           | 12           | 44,054                      |
| Self-enrichment education teachers  | 140           | 170           | 38                 | 30           | 8            | 43,930                      |
| First-line supervisors/managers of production and operating workers           | 2,208         | 2,238         | 261                | 30           | 231          | 42,744                      |
| Cost estimators   | 472           | 526           | 102                | 54           | 48           | 38,189                      |
| Construction and building inspectors  | 243           | 277           | 57                 | 34           | 23           | 37,752                      |
| First-line supervisors/managers of office and administrative support workers  | 4,084         | 4,371         | 708                | 287          | 421          | 37,357                      |
| <b>Total</b>  | <b>14,269</b> | <b>15,290</b> | <b>2,511</b>       | <b>1,021</b> | <b>1,490</b> |                             |
| <b>Weighted Average of Median Annual Earnings</b>                             |               |               |                    |              |              | <b>\$46,214</b>             |

Sources: Economic Modeling Specialists Inc., Texas Workforce Commission and Texas Comptroller of Public Accounts.

earnings, with weighted median earnings of \$90,758 for the region. Occupations requiring both a college degree and work experience provide the second-highest earnings, with weighted median earnings of \$70,524. Occupations requiring a master’s degree provide the third-highest annual earnings, with a weighted median of \$51,378.

In the Central Texas region, occupations requiring postsecondary vocational training provide weighted median earnings of \$45,376 annually. Occupations requiring

an associate degree (without work experience) yield higher earnings than occupations requiring a bachelor’s degree (without work experience). Associate degree occupations offer weighted median earnings of \$51,032, while bachelor’s degree occupations offer weighted median earnings of \$49,559.

Many occupations that meet the “good jobs” definition do not require a college degree. A number of occupations requiring related work experience, on-the-job-training or postsecondary vocational training also



## Antique Rose Emporium

Brenham's Antique Rose Emporium specializes in selling antique and old garden roses. Unlike modern roses, which are hybrids that require a great deal of attention, antique roses are those that grow in the wild, surviving in desolate areas without the care of human hands.<sup>21</sup> Today, the Antique Rose Emporium offers nearly 800 different antique rose varieties through locations in Brenham and San Antonio, as well as the Internet.

The Antique Rose Emporium's founder, G. Michael Shoup, became fascinated with antique roses in the late 1970s, when he discovered ever-blooming roses surviving without any apparent care in rather desolate surroundings in Central Texas. Through the early 1980s, Shoup found other rose varieties surviving in the wild and began cultivating them in his nursery. The Antique Rose Emporium display garden opened in 1985, along with a cottage garden and a small formal planting. The garden combines Texas native plants with roses, much as a pioneer gardener might have done in the 1850s.<sup>22</sup>

The facility also serves as a place for hosting weddings, anniversaries and other celebrations. On the site is a 150-seat chapel, built in 1998, that incorporates many elements of various local churches, including a tall front door with an English stained glass transom and a vaulted ceiling. The reception house, Champneys' Green, is a restored 1904 Victorian home used for smaller functions. All of the buildings are located on landscaped grounds featuring antique roses, perennials and native plants.<sup>23</sup>

The Antique Rose Emporium receives about 85,000 retail customers annually, with the retail centers in Independence (just north of Brenham) and San Antonio accounting for 70,000 visitors. Internet and mail-order sales make up the remaining 15,000 in customers. The Antique Rose Emporium has 200 wholesale customers such as landscapers and other facilities, located primarily in Texas. In 2008, sales for the business totaled about \$2.4 million. The retail centers in Independence and San Antonio accounted for approximately \$1.3 million in sales. Nationwide mail order sales generated about \$800,000, and wholesales accounted for \$300,000. The Antique Rose Emporium employs 30 people at its combined locations.<sup>24</sup>

provide good wages. At weighted median earnings of \$46,214, jobs requiring work experience but no postsecondary education provide earnings near those requiring a bachelor's degree.

**Exhibit 7** lists 25 occupations expected to have the highest number of job openings between 2008 and 2013. The job openings are divided between newly created jobs (growth) and the replacement of existing jobs. Military occupations top the list, with 7,420 job openings between 2008 and 2013 and median annual earnings of \$42,432.<sup>25</sup>

Sixteen of the 25 occupations require short-term or moderate-term on-the-job training. These provide median annual

earnings ranging between \$13,582 and \$32,656. Nurses, with annual earnings over \$54,000, require an associate's degree. Three of the occupations – elementary, middle and secondary school teachers – require a bachelor's degree.

## Comptroller Assistance

One of the many functions of the Texas Comptroller of Public Accounts is to analyze demographics, the labor force and other economic factors needed to generate local economic growth, and provide this information to local governments and other groups. Through its Texas EDGE (Economic Data for Growth and Expansion) program, the agency can



Exhibit 7

**Occupations with the Most Projected Job Openings, Central Texas Region, 2008-2013**

| Rank | Occupation   | 2008 Jobs | 2013 Jobs | Total Job Openings | Growth | Replacement | 2008 Median Annual Earnings |
|------|--|-----------|-----------|--------------------|--------|-------------|-----------------------------|
| 1    | Military Occupations   | 52,238    | 53,323    | 7,420              | 1,085  | 6,335       | \$42,432                    |
| 2    | Combined food preparation and serving workers, including fast food | 14,314    | 16,575    | 3,643              | 2,261  | 1,382       | 14,082                      |
| 3    | Cashiers, except gaming  | 11,846    | 12,420    | 3,614              | 574    | 3,040       | 15,496                      |
| 4    | Retail salespersons  | 13,086    | 14,532    | 3,479              | 1,446  | 2,033       | 18,138                      |
| 5    | Postsecondary teachers   | 9,860     | 12,053    | 3,060              | 2,193  | 867         | 82,914                      |
| 6    | Waiters and waitresses   | 7,192     | 7,904     | 2,683              | 712    | 1,971       | 13,582                      |
| 7    | Registered nurses  | 7,646     | 8,980     | 1,984              | 1,334  | 650         | 54,621                      |
| 8    | Correctional officers and jailers                                  | 5,006     | 6,032     | 1,615              | 1,026  | 589         | 30,285                      |
| 9    | Customer service representatives                                   | 6,431     | 7,095     | 1,559              | 664    | 895         | 22,298                      |
| 10   | Office clerks, general   | 7,622     | 8,392     | 1,469              | 770    | 699         | 18,325                      |
| 11   | Elementary school teachers, except special education               | 6,113     | 6,896     | 1,450              | 783    | 667         | 39,810                      |
| 12   | Janitors and cleaners, except maids and housekeeping cleaners      | 6,065     | 6,785     | 1,312              | 720    | 592         | 17,763                      |
| 13   | Secretaries, except legal, medical, and executive                  | 8,838     | 9,317     | 1,179              | 479    | 700         | 22,526                      |
| 14   | Executive secretaries and administrative assistants                | 5,504     | 6,162     | 1,101              | 658    | 443         | 32,656                      |
| 15   | Personal and home care aides                                       | 3,590     | 4,298     | 1,013              | 708    | 305         | 13,936                      |
| 16   | Secondary school teachers, except special and vocational education | 4,192     | 4,546     | 973                | 354    | 619         | 42,278                      |
| 17   | General and operations managers                                    | 5,383     | 5,667     | 928                | 284    | 644         | 70,533                      |
| 18   | Teacher assistants   | 4,589     | 5,097     | 880                | 508    | 372         | 21,091                      |
| 19   | Laborers and freight, stock, and material movers, hand             | 5,431     | 5,475     | 868                | 44     | 824         | 18,699                      |
| 20   | Bookkeeping, accounting, and auditing clerks                       | 4,876     | 5,357     | 861                | 481    | 380         | 26,229                      |
| 21   | Truck drivers, heavy and tractor-trailer                           | 5,429     | 5,781     | 814                | 352    | 462         | 29,598                      |
| 22   | First-line supervisors/managers of retail sales workers            | 4,285     | 4,642     | 811                | 357    | 454         | 31,242                      |
| 23   | Construction laborers  | 5,040     | 5,647     | 795                | 607    | 188         | 20,904                      |
| 24   | Middle school teachers, except special and vocational education    | 3,388     | 3,773     | 753                | 385    | 368         | 40,570                      |
| 25   | Nursing aides, orderlies, and attendants                           | 4,784     | 5,320     | 752                | 536    | 216         | 18,678                      |

Sources: Economic Modeling Specialists Inc., Texas Workforce Commission, and Texas Comptroller of Public Accounts.



identify occupational and industry trends and their effects on local and regional economies.

Since August 2008, the Comptroller's office has responded to 454 Texas EDGE requests from city and county government

officials, economic development corporations, private businesses and members of the media. These requests cover many topics including demographics, economic development, economic modeling and taxes.

## Shopping and Retail

Businesses and commercial establishments in the Central Texas region generated more than \$11.9 billion in gross sales in 2006, rising to \$13 billion in 2007. Of the 2006 amount, more than \$4.3 billion (about 36 percent) were subject to state and local sales taxes. Of the 2007 amount, more than \$4.6 billion (about 35 percent) was taxed. State sales taxes levied in the region totaled \$355 million in 2006 and \$376 million in 2007.

### Gross Sales and Sales Tax, Retail and Trade, Central Texas Region, 2006 and 2007

| County             | Gross Sales 2006        | Gross Sales 2007        | Amount Subject to State Tax 2006 | Amount Subject to State Tax 2007 | Sales Tax 2006       | Sales Tax 2007       |
|--------------------|-------------------------|-------------------------|----------------------------------|----------------------------------|----------------------|----------------------|
| Bell               | \$4,279,721,397         | \$4,703,395,668         | \$1,348,589,354                  | \$1,448,147,413                  | \$111,258,621        | \$119,472,161        |
| Brazos             | 2,074,397,535           | 2,284,715,560           | 976,557,672                      | 1,074,793,433                    | 80,566,007           | 88,670,458           |
| McLennan           | 2,838,145,759           | 3,015,875,060           | 1,127,857,124                    | 1,162,372,094                    | 93,048,212           | 95,895,697           |
| All Other Counties | 2,714,337,922           | 2,952,760,981           | 831,946,272                      | 876,062,018                      | 70,441,237           | 72,135,161           |
| <b>Total</b>       | <b>\$11,906,602,613</b> | <b>\$12,956,747,269</b> | <b>\$4,284,950,422</b>           | <b>\$4,561,374,958</b>           | <b>\$355,314,077</b> | <b>\$376,173,477</b> |

Source: Texas Comptroller of Public Accounts.

The Central Texas region had more than 43,516 retail employees in 2006 and more than 44,410 in 2007, earning total wages of more than \$982 million in 2006 and \$1.02 billion in 2007. Bell County had the highest number of retail jobs in 2007, followed by McLennan and Brazos counties. The annual average salary of the region's retail employees was \$21,660 in 2006 and \$22,303 in 2007.

The Waco area offers a number of shopping options. In downtown Waco, the Shops of River Square Center boast 40,000 square feet of commercial space selling home furnishings, gifts, antiques, collectibles and clothing, as well as offering a hair salon and a café.<sup>26</sup> Waco's Richland Mall offers a more traditional retail environment, with department stores like Bealls, Dillard's and Sears. The mall includes 708,068 square feet of gross leasing area and is located at the intersection of Texas State Highway 6 and U.S. Highway 84, less than two miles from I-35. The average household income for Richland Mall shoppers, based on a 2007 estimate, is \$47,268.<sup>27</sup>

### Retail Employees and Wages, Central Texas Region, 2006 and 2007

| County             | Employees 2006 | Total Wages 2006     | Employees 2007 | Total Wages 2007     |
|--------------------|----------------|----------------------|----------------|----------------------|
| Bell               | 12,960         | \$292,477,501        | 13,508         | \$311,716,385        |
| Brazos             | 8,991          | 192,633,317          | 9,048          | 201,148,607          |
| McLennan           | 11,494         | 254,817,472          | 11,473         | 261,083,696          |
| All Other Counties | 10,071         | 202,616,518          | 10,381         | 216,555,563          |
| <b>Total</b>       | <b>43,516</b>  | <b>\$942,544,808</b> | <b>44,410</b>  | <b>\$990,504,251</b> |

Source: Texas Workforce Commission.



The Comptroller's office also can provide local demographic data, identify business clusters and provide maps of regional roadways and waterways. For assistance, please visit [www.window.state.tx.us/texasedge](http://www.window.state.tx.us/texasedge) or e-mail [texas.edge@cpa.state.tx.us](mailto:texas.edge@cpa.state.tx.us).

The Comptroller also provides local governments with information about tax-related programs and helps them identify opportunities to raise funds for economic development efforts through property, sales and franchise tax revenues, exemptions and credits. The agency also provides information on special assessments and other opportunities related to disaster relief.

The Comptroller's *Texas Ahead* web portal provides information on tax programs and

incentives, best practices and economic indicators, as well as reports and publications such as our new report on Texas workforce training, *Texas Works*. Texas EDGE, described above, also allows site visitors to build customized models using region-specific data of their choosing.

Finally, the Comptroller's State Energy Conservation Office (SECO) can help local governments slash their energy costs and adopt cost-effective clean energy technologies. SECO offers local governments a free preliminary energy audit of their facilities. These audits provide recommendations for reducing electricity consumption by improving the efficiency of heating and air conditioning systems and lighting.

## **Military Industry Profile**

Much of Central Texas' economic and social diversity stems from Fort Hood's presence. One of the largest military installations in the world, the base encompasses 217,337 acres (or 340 square miles) of southwestern Bell and southeastern Coryell counties.

Fort Hood's economic importance to the Central Texas region and the state continues to grow. Today there are 53,000 soldiers assigned to Fort Hood, as well as 5,100 Department of Army civilians and 9,200 service and contract employees, making it the largest single site employer in Texas.<sup>28</sup> A Comptroller estimate shows Fort Hood contributed \$10.9 billion to the Texas economy in 2007, up 79 percent from \$6.1 billion in 2004.<sup>29</sup> This estimate includes \$4.4 billion in direct expenditures from Fort Hood, consisting of military and civilian pay, military construction projects, military contracts and federal aid.

Fort Hood's presence has brought capital improvement and infrastructure projects to Central Texas that provide local employment and bring in public resources. Capital investment projects on base include the

installation of state-of-the-art command and control facilities and a center for soldier development and education as well as large-scale barracks renovations. The base also contains the Army's largest and most sophisticated rail system, with more than \$100 million invested in rail and airlift capabilities since 2000.<sup>30</sup>

Community growth on and near the base contributes to the area economy as well. Counting active soldiers, the base has a post population of more than 92,000 including nearly 18,000 on-post family members, with another 82,000 family members living off-post. The surrounding area hosts more than 245,000 military retirees and survivor family members.<sup>31</sup>

To accommodate these communities, the Texas Department of Transportation is investing \$161.7 million on a project to widen Highway 195 from Fort Hood to IH-35 in Georgetown. Several projects totaling \$350 million at or near the base are under way or in planning stages. Fort Hood is also working with Beaumont and Corpus Christi to make port improvements to support deployments.<sup>32</sup>





## Military Industry Profile (cont.)

Central Texas' military presence continues to supply the local economy with a large pool of dedicated and skilled workers as soldiers move from military service to civilian life. To aid this transition, each month the Army Career and Alumni Program (ACAP) assists more than 700 soldiers who complete their military service at Fort Hood. The ACAP provides former soldiers and their family with skills assessments, resume writing guidance, career counseling and job search training, among other services.<sup>33</sup>

Local businesses and national companies recruit on base with up to 12 workshops per week. Biannual job fairs also bring employment opportunities; one recent fair attracted more than 150 companies from all sectors of the economy.<sup>34</sup>

The base also draws national industries that otherwise might locate elsewhere. Defense contractors make up a large share of the region's employers, providing nearly 5,300 jobs. Top regional defense employers Weststar Aerospace & Defense Group and Science Applications International each employ more than 1,000 in the region.<sup>35</sup>

Fort Hood is home to a significant portion of combat-ready air and ground forces, with one out of every 10 active duty soldiers in the U.S. Army stationed at Fort Hood. It is the only post capable of stationing and training two Armored Divisions and ranks first among the Army's 97 installations in terms of future capability.<sup>36</sup>

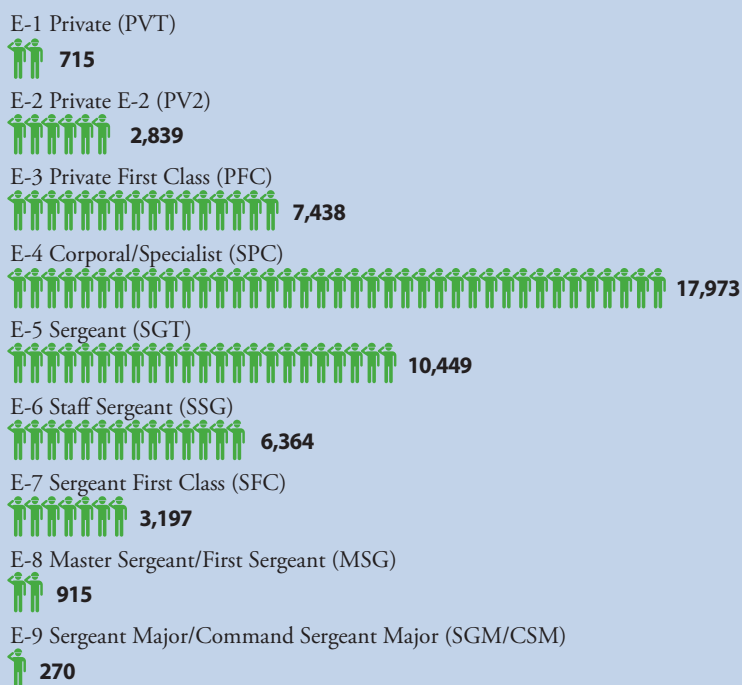
The base takes advantage of its unique size and geography to conduct realistic operational testing overseen by the Operational Test Command (OTC). The Western Maneuver Area offers a 20-mile stretch for training exercises, allowing a fully equipped heavy battalion to conduct live-fire exercises for weeks on end. While units simulate combat and prepare themselves for real world situations, the OTC carefully measures the performance of everything from equipment effectiveness to soldier decision-making. Fort Hood also has the Army's largest combat

aviation training area, with 15,900 square miles that allow helicopter crews to practice over realistic distances and terrains.<sup>37</sup>

Units stationed at the base perform a broad range of Army functions, from divisions of infantry to surveillance and even finance. As more military families develop roots in the area, communities continue to grow, attracting businesses that seek to capitalize on a growing work force.

To help manage this growth, Fort Hood offers the Recovery Credit System, an incentive-based program that partners local landowners with Fort Hood to benefit both conservation efforts in Central Texas and Fort Hood's training flexibility. Qualifying landowners voluntarily enter into contracts for habitat management in exchange for technical guidance and additional means to maintain their farm or ranch. Specifically, this program enhances endangered golden-cheeked warbler habitat and assists towards recovery of the species. Fort Hood is able to use credits obtained through this program to increase the use of the land on the installation for military training.<sup>38</sup>

### Enlisted Soldiers at Fort Hood



Source: United States Army.



## Ranching in Central Texas

Beef cattle ranching is an important contributor to the Central Texas economy. The industry's 219 establishments employed more than 870 workers and paid more than \$23 million in wages, for an average of \$26,800 per employee in 2007.<sup>39</sup> Ranching generates around \$1.5 billion in annual economic output and \$418 million in value-added activities for the region. Of the 3.25 million acres used for regional agriculture, nearly 24 percent is dedicated pastureland.<sup>40</sup>

Throughout the region, ranchers conduct all stages of the beef production process. Cow-calf operations, often seen along highways and rural roads, raise calves for about a year, allowing free-range grazing on pastures in herds. After calves are weaned from their mothers, they are sold to stockers, feeders and backgrounders where calves continue grazing and begin receiving supplemental grains. Between the ages of 12 and 18 months, the cattle are sold to feedlots where they receive growth-promoting supplements and grain rations to build lean muscle. Cattle are considered ready for processing once they reach 18 to 22 months, or a weight of between 1,100 and 1,250 pounds.<sup>41</sup>

Central Texas ranchers can take advantage of small winter grains by sowing oats and rye grass in the fall that provide winter grazing for cattle. Falls and Hill County are both known as strong areas for winter grazing.<sup>42</sup>

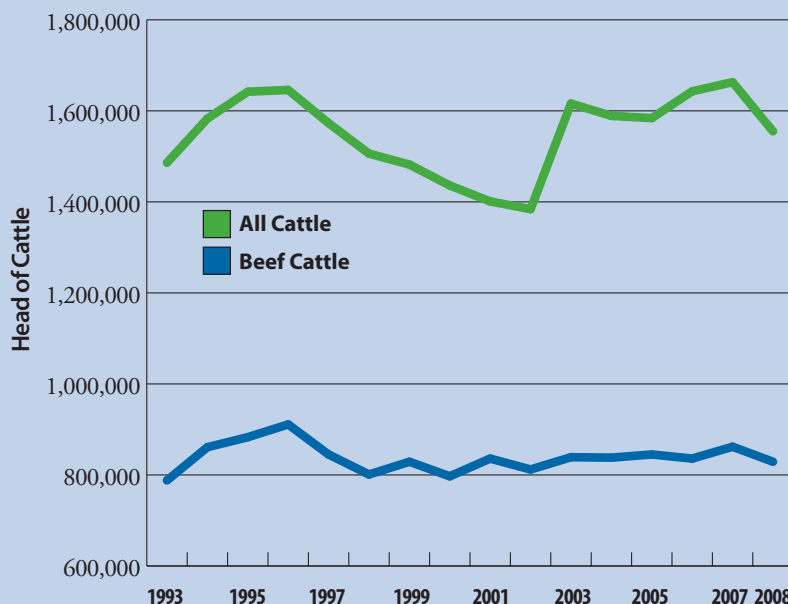
Ranchers produced more than 1.5 million head of cattle in 2008, comprised of 829,000 head of beef cattle with the remainder including calves, replacement heifers, and some bulls and dairy cows.<sup>43</sup> Although the Central Texas region was once home to many small dairy producers, most have followed statewide consolidation trends and shifted into other operations, as economies of scale favor large operations in the Panhandle, near Erath and Comanche

counties, or near Sulfur Springs. Farms and ranches must also compete with urban growth, as developers look to agricultural land for residential and commercial expansion, or to develop recreational and hunting ranches.

Central Texas cattle production rose in the early 1990's, peaking in 1996. Production levels then dropped off through the end of the decade following the end of a natural cattle cycle, as low prices led to inventory selloffs and dry weather reduced grass growth. Average cattle production cycles last around 10 years and occur largely from the lag between ranch decision making and the biological process of cattle. Ranchers base current breeding decisions on cattle price expectations roughly two years ahead, along with other expectations like fuel costs and grass availability. When cattle reach the processing stage two years later, ranchers adjust inventories with current prices. This two year discrepancy leads to gradual inventory buildups and liquidations.<sup>44</sup>

Central Texas employs 7.3 percent of the state's beef cattle workers and is home to nearly 8.8 percent of the state's beef cattle ranching establishments.<sup>45</sup>

**Cattle Production, 1993-2008**



Source: U.S. Department of Agriculture, National Agricultural Statistics Service.



## Endnotes

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- <sup>2</sup> Interview with Billy Clemons, administrator, City of Caldwell, Caldwell, Texas, February 4, 2009.
- <sup>3</sup> Interview with John Larch, vice president and general manager, Zodiac Enterprises.
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- <sup>10</sup> Interview with Michael Gokey, city manager, Fairfield, Texas, February 6, 2009.
- <sup>11</sup> Blue Bell Creamery, "Our History," pp. 1-2, [http://www.bluebell.com/The\\_Little\\_Cremery/history.aspx](http://www.bluebell.com/The_Little_Cremery/history.aspx). (Last visited March 20, 2009.)
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- <sup>39</sup> U.S. Bureau of Labor Statistics, "Quarterly Census of Employment and Wages," <http://www.bls.gov/cew/>. (Last visited March 18, 2009.) Custom queries.
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# Demographics

The Central Texas region is more rural than Texas as a whole. In 2008, 23 percent of the region's population lived in rural areas, compared with just 13 percent of all Texas residents.<sup>1</sup> Due largely to the region's rural makeup, Central Texas' population is growing more slowly than that of the state.

From 2003 to 2008, Texas' population grew at an annual rate of 1.9 percent, compared to Central Texas' 1.1 percent rate. The region has a greater share of young people than the state or nation,

however. And the region's personal income rose by more than 36 percent from 2001 to 2006, outpacing statewide growth.

The 20 counties of the Central Texas region include three metropolitan statistical areas (MSA) — Bryan-College Station (Brazos, Burleson and Robertson counties), Killeen-Temple-Fort Hood (Bell, Coryell and Lampasas counties) and Waco (McLennan County). As defined by the federal government, an MSA contains a core urban area of 50,000 or more residents, accompanied by adjacent communities that have a high degree of economic and social interaction with that core (as measured by commuting to and from work).<sup>2</sup> **Exhibit 8** illustrates the region's

*The region's personal income rose by more than 36 percent from 2001 to 2006, outpacing statewide growth.*



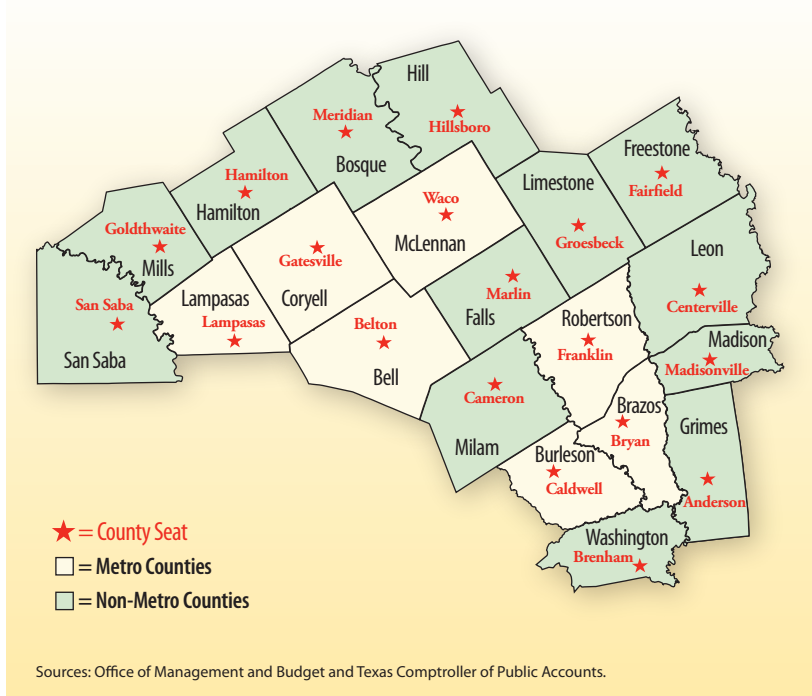
One-day communitywide job shadowing initiative in Waco.

PHOTO: Greater Waco Chamber of Commerce



Exhibit 8

### Central Texas Metro Counties



metro counties and the county seats for each county in the region.

### Population Growth

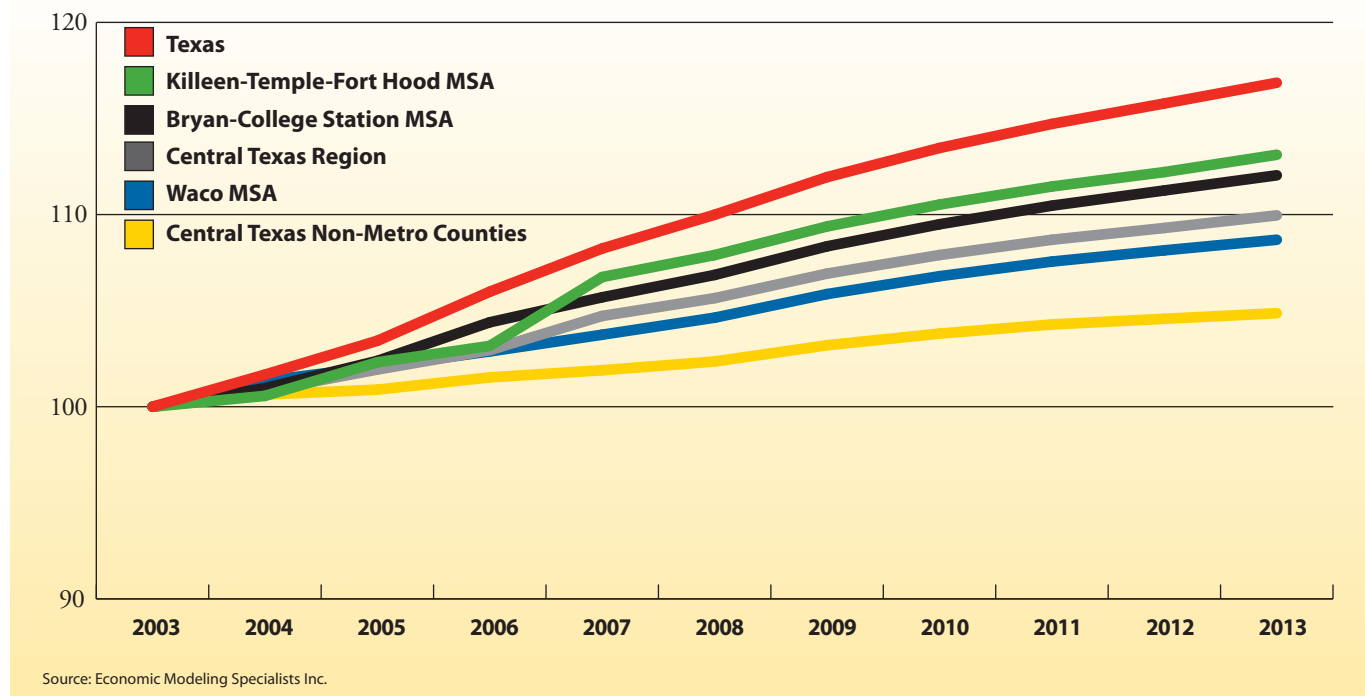
The Central Texas region's population is expected to increase by 10 percent between 2003 and 2013, compared to nearly 17 percent for Texas (Exhibit 9). Population in the region's metro counties will rise by 11.5 percent over the same period, led by Killeen-Temple-Fort Hood and Bryan-College Station. Waco MSA population growth is expected to lag the regional rate.<sup>3</sup>

### Age

The Central Texas region's population is younger than that of the state and the nation. In 2008, 40 percent of the region's residents were under the age of 25. The state and U.S. equivalent was 37.4 and 34

Exhibit 9

### Central Texas Actual and Projected Population, 2003-2013





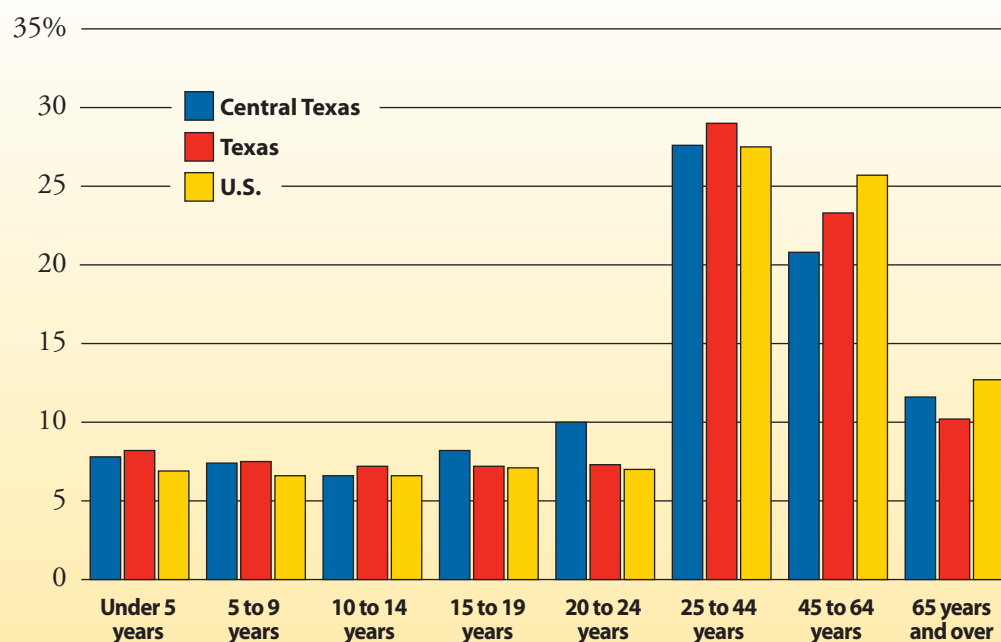
percent, respectively. Much of this young population is in the 20-24 age group, accounting for 10 percent of the region's total population (**Exhibit 10**).

## Ethnicity

The region's ethnic breakdown more closely resembles that of the U.S. than Texas (**Exhibit 11**). Hispanics represented

Exhibit 10

### Central Texas Region, Texas and U.S. Population by Age, 2008



Source: Economic Modeling Specialists Inc.

## International Festival-Institute at Round Top

World-famous concert pianist James Dick founded the International Festival-Institute at Round Top in 1971. The institute, supported by the James Dick Foundation for the Performing Arts, began as a small event but has bloomed into an internationally acclaimed music institute for young musicians and faculty.

The Festival-Institute offers year-round educational and performance programs on a 210-acre campus with performance facilities, historic houses, parks, gardens and nature preserves. The institute is also an important center for research and scholarly study, with rare books, manuscripts, historic recordings, archival material and music.<sup>4</sup>

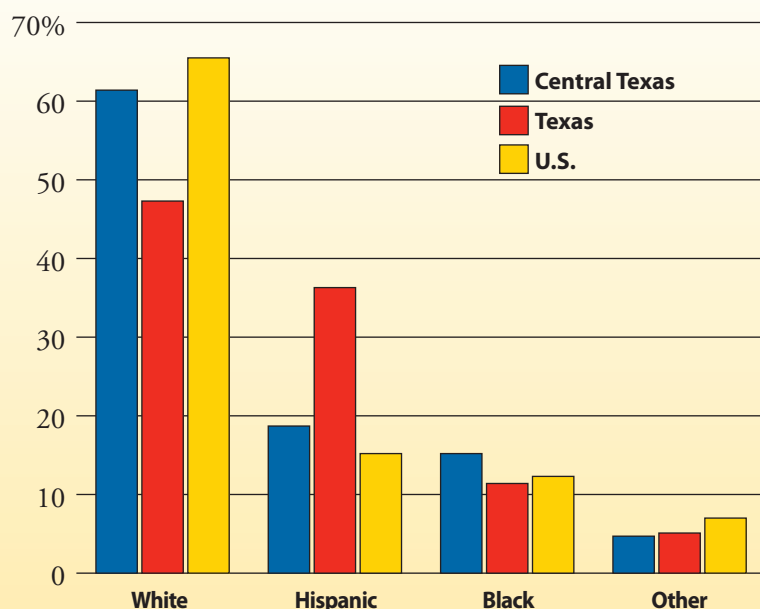
Round Top attracts music students from conservatories and universities throughout the U.S. and overseas. The Festival Concert Hall, completed in April 2007, is one of the best in the country. Museum lectures are presented at Festival Hill every year, and the beautiful campus attracts visitors from all around the world.<sup>5</sup>

The Summer Institute program at Round Top offers six weeks of training for young musicians pursuing a transition from universities and conservatories to professional careers. Admissions are based on auditions and recommendations; young artists in the program receive full scholarships worth \$5,500 for tuition. About 85 people participate in the program each year.<sup>6</sup>





Exhibit 11

**Central Texas Region, Texas and U.S. Population by Ethnicity, 2008**

Source: Economic Modeling Specialists Inc.

19 percent of Central Texas population in 2008, compared to 36 percent for the state; nationally, the Hispanic share was 15 percent.

Whites represent a clear majority in the region, with 61 percent of the population. Blacks make up 15 percent, a higher proportion than in the U.S. The remaining five percent fall in the “other” category, including persons of American Indian, Asian and Native Hawaiian descent and those claiming descent from two or more races.<sup>7</sup>

**Educational Attainment**

In 2008, 19 percent of all Central Texas region adults had less than a high school diploma. This percentage is higher than the U.S. average, but lower than that for Texas. The Central Texas region, however, had a lower share of residents with an associate, bachelor's or graduate degree at 28 percent.

**Famous People from the Central Texas Region**

The Central Texas region has produced many prominent sports legends, entertainers and political figures.

Born in Waco, linebacker Derrick Johnson is a two-time All-American honoree and Butkus Award winner who currently plays for the Kansas City Chiefs. Local athlete, running back LaDainian Tomlinson from Rosebud, attended Texas Christian University and currently has a successful career with the San Diego Chargers franchise. Finally, Lance Berkman, from Waco, was a first round draft choice in 1997 by the Houston Astros and plays first base and right field.

The area has also produced several well-known entertainers. Blind Lemon Jefferson, best known for hits “Black Snake Moan” and “Matchbox Blues,” was born in the now defunct town of Couchman. Waco's Hank Thompson was elected to the Country Music Hall of Fame in 1989. Abbott is the birthplace of famed country music singer and songwriter Willie Nelson, who has written more than 2,500 songs and released almost 300 albums.

Tommy Lee Jones, an eighth-generation Texan from San Saba, is an Academy Award-winning actor with numerous credits in film and television. Comedian Steve Martin was born in Waco as well.

A few high-profile Texas political figures were born in Central Texas. The famous “Pa and Ma” Ferguson, Texas Governors James E. and Miriam A. Ferguson, were both natives of Bell County. Famous for his love of Texas and his saying “God Bless Texas,” former Lieutenant Governor Bob Bullock first entered politics as a state representative from his hometown of Hillsboro in 1956. Governor Ann Richards was born in Lacy Lakeview, a suburb of Waco.<sup>8</sup>



## Dr Pepper Museum

Founded in 1988, the Dr Pepper Museum is housed in the 1906 Artesian Manufacturing and Bottling Company building in Waco's turn-of-the-century manufacturing district. The Dr Pepper Company donated the historic building to the nonprofit Dr Pepper Museum and Free Enterprise Institute. The museum opened to the public on May 11, 1991. Over the next six years, construction and renovation continued until the entire building was restored in May 1997. The museum has attracted more than a million visitors since its opening.<sup>9</sup>

The museum traces the development of Dr Pepper from its origins in Morrison's Old Corner Drug Store in Waco around 1885 through the present day. The museum's collection of artifacts has grown from 1,600 when it first opened to more than 20,000 items today.

The museum's first floor traces the early years of Dr Pepper with an exhibit on the Old Corner Drug Store and Dr. Charles Alderton, the inventor of Dr Pepper. Adjacent rooms display early bottling equipment, as well as an artesian spring water well and examples of the earliest Dr Pepper bottles. The second floor features a representation of a 1930s rural general store complete with a 1924 pickup truck. The remainder of the floor houses temporary exhibits and other exhibits highlighting different brands and aspects of the soft drink industry.

The W.W. Clements Free Enterprise Institute occupies the third floor. Created in 1997, the institute uses the soft drink industry as a model for teaching students and adults about developing, producing and marketing commercial products. In early 2008, a new exhibit opened honoring W. W. "Foots" Clements, former CEO and President of the Dr Pepper Company.<sup>10</sup>

In 2008, Dr Pepper was the fifth best selling soft drink in the U.S., with the Dr Pepper Snapple Group reporting \$5.7 billion in net sales.<sup>11</sup> The museum's \$900,000 annual operating budget is funded through contributions, memberships, admissions and the sale of merchandise through its for-profit subsidiary, DP Museum Enterprises. It also receives support from Dr Pepper Snapple Group (parent company of Dr Pepper) and its affiliated bottlers but is not owned or operated by them.<sup>12</sup> The museum continues renovating the Kellum-Rotan building, located behind the original building, to create a new collections and archives storage center that will accommodate more than 90,000 objects.<sup>13</sup>

The state and U.S. share was 31 and 34 percent, respectively (**Exhibit 12**).<sup>14</sup>

## Income

The median income for all Texas households in 2007 (most recent data available) was \$47,563. In the Central Texas region, Bell County (which contains a large part of Fort Hood) had the highest median household income, at \$47,434. Falls County had the lowest, at \$30,265. The counties of the Bryan-College Station MSA (Brazos, Burleson and Robertson counties) had median

incomes between \$35,500 and \$41,500.

Brazos County, home to Bryan, had the lowest income of the region's metropolitan areas, at nearly \$38,039 (**Exhibit 13**).<sup>15</sup>

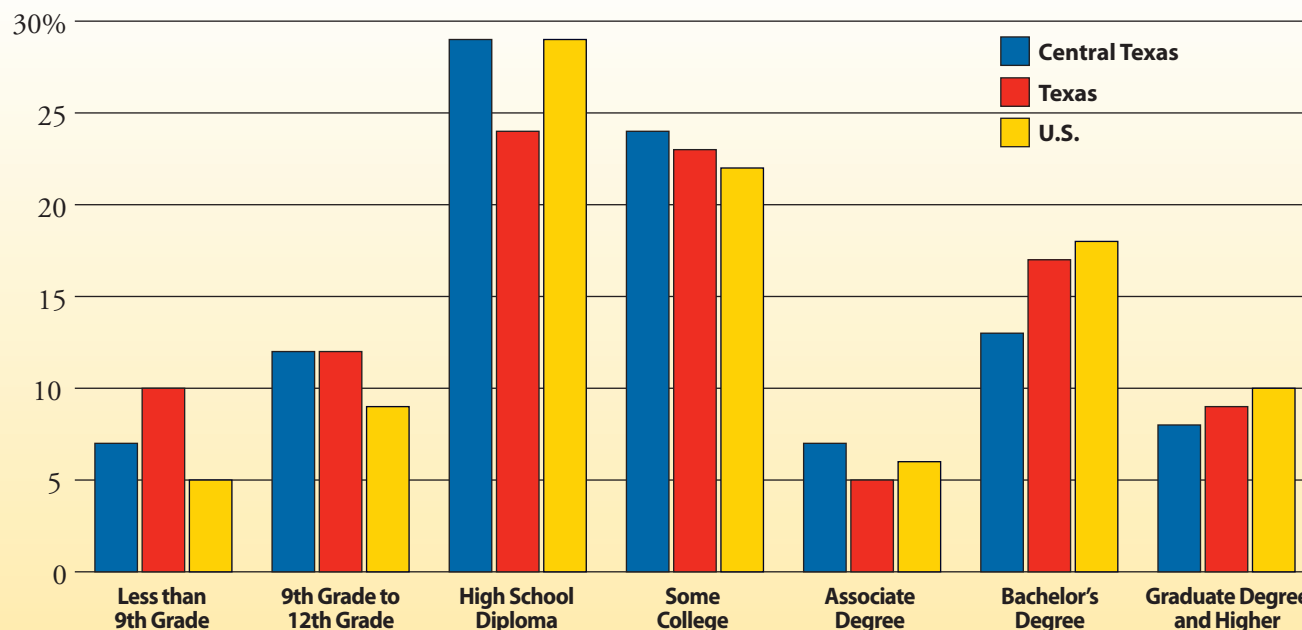
While the region's median household incomes are lower than the statewide average, such measures do not take the cost-of-living into account. A cost-of-living adjustment can facilitate a more accurate comparison of income.

For instance, a person earning an annual salary of \$35,000 in Waco would have the equivalent purchasing power of a person



Exhibit 12

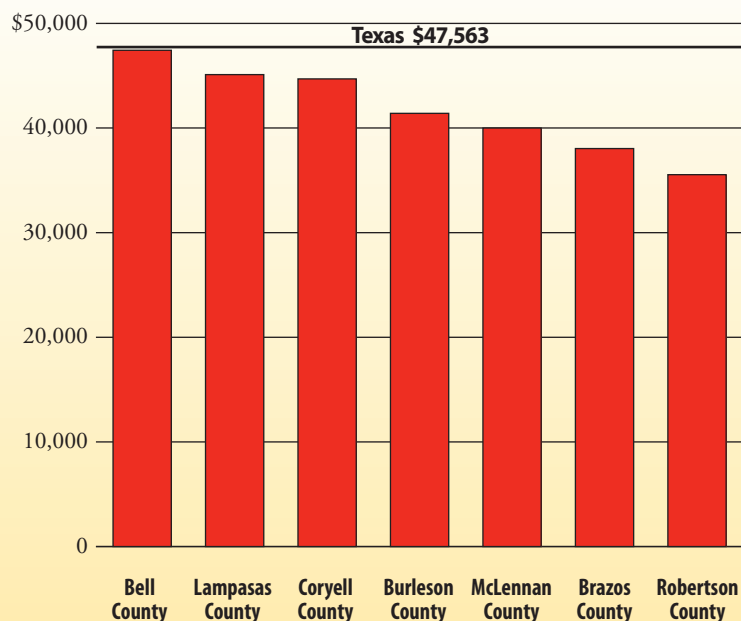
**Educational Attainment for Population Over the Age of 25, 2008, Central Texas, Texas and U.S. Averages**



Source: Economic Modeling Specialists Inc.

Exhibit 13

**Median Household Income, Central Texas MSA Counties, 2007**



Source: U.S. Census Bureau.

living in Dallas earning \$44,132, or 26 percent more. The purchasing equivalent in Austin would be \$45,652.<sup>16</sup>

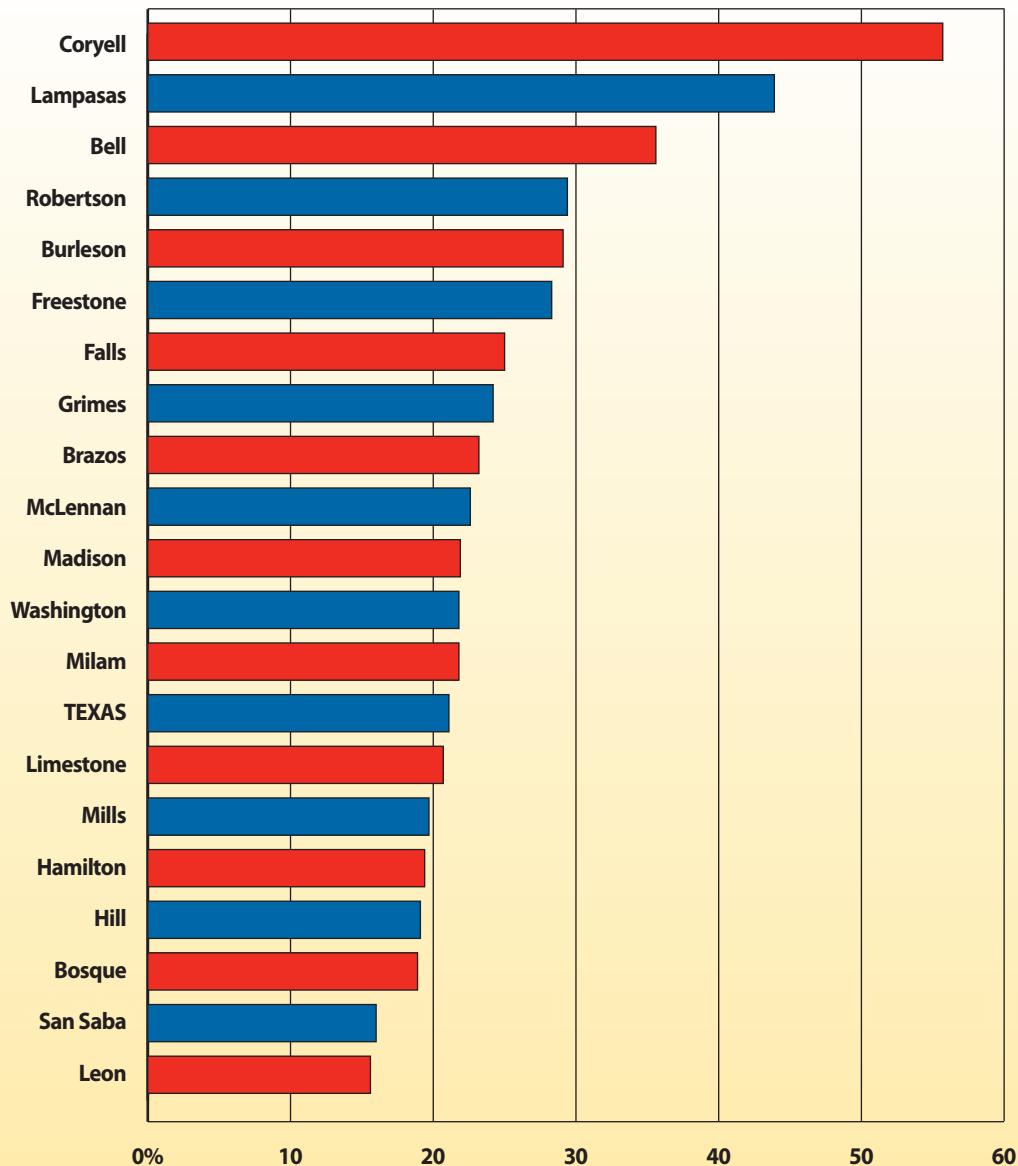
Total personal income in Central Texas rose by 36.1 percent between 2001 and 2006 (most recent data available at the county level), compared with 32.8 percent for the state as a whole. Five counties in the region outpaced the state average during this period.

The region's per capita personal income averaged nearly \$28,800 in 2006, about 82 percent of the state average of \$35,166. All counties in the Central Texas region trail the statewide average in per capita income. Many Central Texas counties, however, did outpace the state in per capita income growth between 2001-2006 (**Exhibit 14**).<sup>17</sup>



Exhibit 14

### Central Texas Per Capita Personal Income Percent Increase 2001-2006



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

### Madisonville Mushroom Festival

The Texas Mushroom Festival is held each October in Madisonville, the "Mushroom Capital of Texas." The festival features a variety of events including wine tasting, cooking demonstrations, arts and crafts, food vendors and a race called the "Shiitake 5K Run and Walk" around scenic Lake Madison Park. A festival highlight is a gala steak and mushroom dinner.<sup>18</sup> In 2008, a number of Texas wineries participated in the festival including Bernhardt, McReynolds and Chisholm Trail.<sup>19</sup>



## Public Safety in the Central Texas Region

One of the most important factors in a region's quality of life is public safety. Although Central Texas crime rates rose faster than statewide rates from 2006 to 2007, total crime rates in the region remained lower than state figures, making the region safer than the state on average. The table below shows the rates of various criminal offenses per 100,000 residents for both the Central Texas region and the state in 2006 and 2007.<sup>20</sup>

### Crime Rates – Central Texas, 2006-2007

|                         | 2006 Central Texas Crime Rate | 2006 Texas Crime Rate | 2007 Central Texas Crime Rate | 2007 Texas Crime Rate | Central Texas Change in Crime Rate | Texas Change in Crime Rate |
|-------------------------|-------------------------------|-----------------------|-------------------------------|-----------------------|------------------------------------|----------------------------|
| Murder                  | 3.4                           | 5.9                   | 4.1                           | 5.9                   | 22.0                               | 0.5                        |
| Rape                    | 45.3                          | 35.8                  | 45.8                          | 35.3                  | 1.0                                | -1.4                       |
| Robbery                 | 85.4                          | 158.5                 | 88.7                          | 162.2                 | 3.9                                | 2.3                        |
| Assault                 | 260.3                         | 317.4                 | 308.7                         | 307.8                 | 18.6                               | -3.0                       |
| <b>Violent Crime</b>    | <b>394.4</b>                  | <b>517.6</b>          | <b>447.3</b>                  | <b>511.2</b>          | <b>13.4</b>                        | <b>-1.2</b>                |
| Burglary                | 988.3                         | 917.8                 | 992.7                         | 955.2                 | 0.4                                | 4.1                        |
| Larceny                 | 2,326.7                       | 2,756.9               | 2,418.3                       | 2,771.4               | 3.9                                | 0.5                        |
| Auto Theft              | 188.4                         | 407.3                 | 173.4                         | 393.3                 | -8.0                               | -3.4                       |
| <b>Property Crime</b>   | <b>3,503.4</b>                | <b>4,082.0</b>        | <b>3,584.4</b>                | <b>4,119.9</b>        | <b>2.3</b>                         | <b>0.9</b>                 |
| <b>Total Crime Rate</b> | <b>3,897.8</b>                | <b>4,599.6</b>        | <b>4,031.7</b>                | <b>4,631.1</b>        | <b>3.4</b>                         | <b>0.7</b>                 |

Note: All crime rates are reported per 100,000 population.  
Source: Texas Department of Public Safety.

The Comptroller's office estimates that public safety and criminal justice accounted for about 11,000 jobs in the Central Texas region and more than \$425 million in earnings in 2007.<sup>21</sup>

## Czech Heritage Festivals

Immigrants from Czechoslovakia and other Central European countries settled in the Central Texas region throughout the latter half of the 19th century, bringing with them recipes for kolaches — bread rolls stuffed with various fillings such as cheese and fruit. Since then, kolache recipes have become a Texas favorite, varying from light, flaky fruit-filled deserts to hearty meat-filled rolls and every variety in between.

The city of West, located just north of Waco on IH-35, celebrates its Czech heritage with an event called Westfest each year. Held over Labor Day weekend, Westfest features polka music and dancing. Visitors can watch costumed dance groups perform and participate in polka dances of their own. In addition, the event features a parade showcasing colorful Czech, Moravian and Slovakian costumes, as well as a kolache baking contest. Nearly 20,000 guests attended Westfest in 2008; vendors sold more than 4,000 kolaches in addition to numerous other treats.<sup>22</sup>

Caldwell is another city that commemorates its Czech heritage through kolaches. Located in Burleson County, about 25 miles southwest of Bryan-College Station, Caldwell has become famous for its September Kolache Festival. The one-day festival features various Czech arts and crafts, including stenciling, basket weaving, egg decorating, quilting, wood carving and sculpting. Costumed polka dancers entertain thousands of guests. The primary draw for most guests, of course, is the kolaches, with a number of varieties sold by bakeshop vendors. Each year, Caldwell's Kolache Festival draws between 20,000 and 30,000 people.<sup>23</sup>



## Texas Rangers Hall of Fame and Museum

Waco's Texas Rangers Hall of Fame and Museum is the official repository for materials and artifacts relating to the history of the Texas Rangers.<sup>24</sup> The museum houses many exhibits featuring the firearms, badges and other equipment used by Texas Rangers from their inception in 1823 to the present day. The Hall of Fame also pays tribute to 30 Rangers that gave their lives in the line of duty or served with great distinction.<sup>25</sup>

The museum's Research Center serves as the state-designated library and archives for the Texas Rangers. The Research Center preserves and interprets records, archives and photographs related to the Texas Rangers. It also provides the public with research services on the Rangers, receiving about 3,500 on-site and mail requests for such assistance each year.<sup>26</sup>

The museum chronicles the early years of the Rangers, starting with Stephen F. Austin's assembly of two companies of men to protect settlements of the Mexican province of Tejas in 1823. It tells of their role as federal scouts during the 1846 war with Mexico and as a Confederate army regiment during the Civil War. The story continues, covering gunfights with outlaws such as Sam Bass, the capture of John Wesley Hardin and the pursuit of fence-cutters in the 1880s.

Other exhibits highlight the Rangers' role in the early part of the 20th century, chasing bootleggers and smugglers during Prohibition and keeping the peace in oil boomtowns in the 1920s and 1930s. The museum also traces the modernization of the Rangers, beginning with their restructuring as a division within the Department of Public Safety in 1935.<sup>27</sup> Today's Rangers still wear the boots, white western hats and gun belts of their predecessors, but they are superior law enforcement officers with advanced educations and the latest computer databases, telecommunications and forensic tools available within the global crime fighting field.<sup>28</sup>

The museum opened in 1968 as the Colonel Homer Garrison Texas Ranger Museum and added the Ranger Hall of Fame in 1976 with funds raised by the Texas Ranger Commemorative Commission, created by the Legislature to honor the Rangers' 150th anniversary in 1973.<sup>29</sup>

Funding sources for museum operations include about \$1.3 million annually from the city of Waco and private donations. The museum has a \$3 million to \$4 million annual economic impact on the local economy and generates 60 to 80 percent of its operating costs through museum revenues. Over the past 40 years, the museum has attracted about \$70 million in tourism revenues for the city of Waco, against a city investment over that time of about \$10 million.

The museum has had more than 3.5 million visitors. In 2006, it received \$2.1 million in state funds for the construction of a Public Safety Education Center and Texas Rangers Company "F" Headquarters on the site.<sup>30</sup>

## Endnotes

<sup>1</sup> Data provided by Economic Modeling Specialists Inc., (EMSI).

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<sup>3</sup> Data provided by EMSI.

<sup>4</sup> The International Festival-Institute at Round Top, "About Us," p. 1, [http://www.festivalhill.org/index.php?module=pagemaster&PAGE\\_user\\_op=view\\_page&PAGE\\_id=6&MMN\\_position=6:6](http://www.festivalhill.org/index.php?module=pagemaster&PAGE_user_op=view_page&PAGE_id=6&MMN_position=6:6). (Last visited March 10, 2009.)

<sup>5</sup> The International Festival-Institute at Round Top, "History," p. 2, [http://www.festivalhill.org/index.php?module=pagemaster&PAGE\\_user\\_op=view\\_page&PAGE\\_id=7&MMN\\_position=9:6](http://www.festivalhill.org/index.php?module=pagemaster&PAGE_user_op=view_page&PAGE_id=7&MMN_position=9:6). (Last visited March 10, 2009.)

<sup>6</sup> The International Festival-Institute at Round Top, "Program Overview," p. 1, [http://www.festivalhill.org/index.php?module=pagemaster&PAGE\\_user\\_op=view\\_page&PAGE\\_id=52](http://www.festivalhill.org/index.php?module=pagemaster&PAGE_user_op=view_page&PAGE_id=52). (Last visited March 10, 2009.)

<sup>7</sup> Data provided by EMSI.

<sup>8</sup> Derrick Johnson Official Website, "Derrick Johnson #56," p. 1, [http://derrickjohnson.fsmsgsports.com/\\_content/about.html](http://derrickjohnson.fsmsgsports.com/_content/about.html); and Fox Sports, "Derrick Johnson 56: Linebacker: Kansas City Chiefs," p. 1, <http://msn.foxsports.com/nfl/player?statsID=7191>; and The Official Website of LaDainian Tomlinson, "Bio: Stats and Records from My College and Pro Career," p. 1, <http://www.ladainiantomlinson.com/#bio>; and Yahoo Sports, "Lance Berkman," <http://sports.yahoo.com/>



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- <sup>11</sup> "Special Issue: Top-10 CSD Results for 2008," *Beverage Digest* (March 30, 2009), p. 2, [http://www.beverage-digest.com/pdf/top-10\\_2009.pdf](http://www.beverage-digest.com/pdf/top-10_2009.pdf); and Dr Pepper Snapple Group, "Dr Pepper Snapple Group Reports Fourth Quarter 2008 Results," Plano, Texas, March 26, 2009, pp. 8, 13, 17, <http://drpeppersnapple.mediaroom.com/index.php?s=43&item=93>. (Last Visited April 7, 2009). (Press release.)
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- <sup>14</sup> Data provided by EMSI.
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- <sup>16</sup> Sperling's Best Places, "Cost of Living Calculator," <http://www.bestplaces.net/col/>. (Last visited March 2, 2009.) Custom queries created comparing Waco, Texas to Austin and Dallas, Texas.
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- <sup>24</sup> Texas Ranger Hall of Fame and Museum, "Visitor Information," p. 1, <http://www.texasranger.org/visitor/MissionGoals.htm>. (Last visited March 9, 2009.)
- <sup>25</sup> Texas Ranger Hall of Fame and Museum, "Texas Ranger Hall of Fame," p. 1, <http://www.texasranger.org/halloffame/HOF.htm>. (Last visited March 9, 2009.)
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- <sup>27</sup> Texas Ranger Hall of Fame and Museum, "A Brief History of the Texas Rangers," by Mike Cox, pp. 2, 5-7, 10-11, <http://www.texasranger.org/history/BriefHistory1.htm>; and Texas Ranger Hall of Fame and Museum, "A Brief History of the Texas Rangers: Part II," by Mike Cox, pp. 2-4, <http://www.texasranger.org/history/BriefHistory2.htm>. (Last visited March 10, 2009.)
- <sup>28</sup> Texas Ranger Hall of Fame and Museum, "Texas Rangers Today," p. 1, <http://www.texasranger.org/today/rangerstoday.htm>. (Last visited March 10, 2009.)
- <sup>29</sup> Texas Ranger Hall of Fame and Museum, "Texas Ranger History: Texas Ranger Timeline," pp. 4-5, <http://www.texasranger.org/history/Timespecial.htm>. (Last visited March 10, 2009.)
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# Infrastructure

**A**ny area's economic stability relies on the resources and the infrastructure that sustain it, including natural resources such as lakes and parklands, as well as highways and power plants.

A reliable supply of fresh water is needed to sustain life, and also to support activities such as agriculture, commerce and electric power generation. Employers prefer areas with good transportation systems and adequate energy and water supplies, along with quality-of-life resources such as recreational opportunities, a clean environment and a pleasant climate. Central Texas' infrastructure has much to offer its current and future residents.

The region faces the same challenges as other areas of the state. A struggling national economy is slowing the pace of Texas growth and development. Even so, a robust infrastructure will allow the region to maintain stability and continue its expansion when the national economic climate improves.

## Water

The Central Texas region is an area of diverse water resources. Bisected by the Brazos River, bordered on the east by the Trinity River and containing a portion of the Colorado in its western end as well, the region also sits above two major aquifers and has 16 major reservoirs and lakes. Average annual rainfall in the region ranges from nearly 28 inches in its westernmost counties to about 45 inches in its eastern end. (Statewide rainfall averages range

*Central Texas' infrastructure has much to offer its current and future residents.*

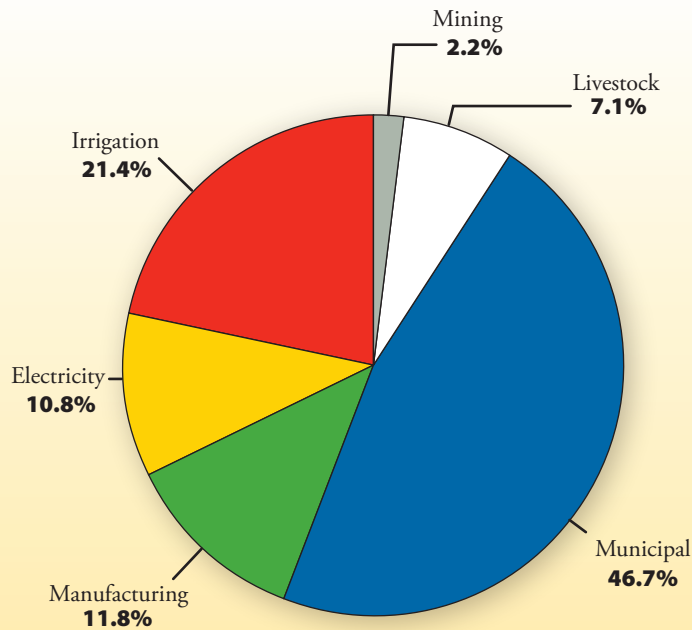


Road construction in Brazos County.

PHOTO: Texas A&M University



Exhibit 16

**Central Texas Region Total Water Use, 2006**

Source: Texas Water Development Board.

from 10 inches annually in far West Texas to 55 inches in the Southeast.)<sup>1</sup>

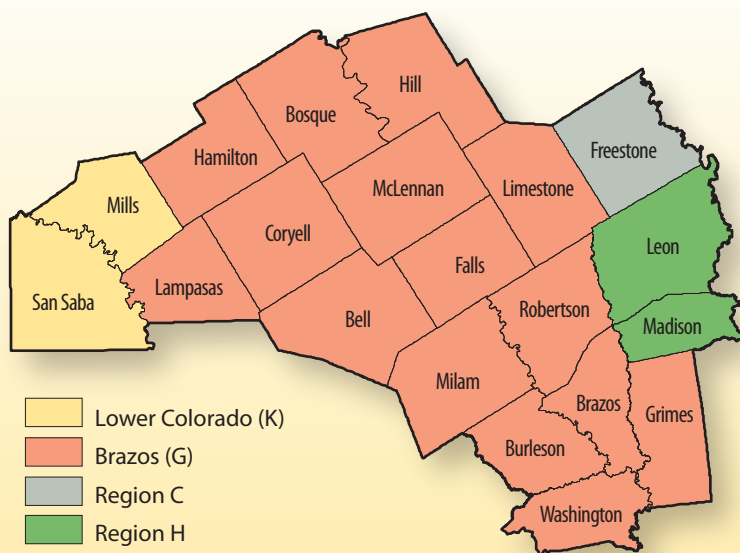
In 2006 (the most recent data available), municipal water systems accounted for nearly half of the water used in Central Texas, with irrigation representing the second-largest sector of use (**Exhibit 16**). The region also uses water for manufacturing, electricity generation, livestock and a small amount for mining.<sup>2</sup>

Nearly all of the Central Texas region lies within the Brazos Region (G) water planning region, as designated by the Texas Water Development Board (TWDB). Two counties on the western end of the region (Mills and San Saba) are in the Lower Colorado Region (K); one county on the northeast corner (Freestone) is in Region C; and the other two most easterly counties (Leon and Madison) lie in Region H (**Exhibit 17**).

Under state law, water planners must estimate water supply and use for a 50-year period; the current planning cycle covers the years 2010 through 2060. Based on data from 2000, planners project that annual water use in the Central Texas region will rise by 49 percent, to 617,865 acre-feet in 2060. (One acre-foot of water equals 325,851 gallons, the amount of water needed to cover an acre of land a foot deep. An acre-foot roughly equals the annual consumption of two to three households in Texas. A regulation Olympic-sized swimming pool holds about two acre-feet.)

Within that increase, changes are expected in the portions used by each sector of the economy. Municipal water use is projected to continue to account for more than 45 percent of the region's water use in 2060. Electricity's share, however, is projected to almost double, while the portion devoted to

Exhibit 17

**Central Texas Regional Water Planning Groups**

Sources: Texas Water Development Board.



Exhibit 18

**Central Texas Actual and Projected Total Water Use by Sector, 2000-2060**  
(in acre-feet)

| Sector         | 2000           | 2020           | 2040           | 2060           |
|----------------|----------------|----------------|----------------|----------------|
| Irrigation     | 62,669         | 59,324         | 55,893         | 52,536         |
| Livestock      | 26,581         | 26,581         | 26,581         | 26,581         |
| Manufacturing  | 13,209         | 17,482         | 19,697         | 23,280         |
| Mining         | 41,734         | 18,075         | 6,784          | 5,230          |
| Municipal      | 181,917        | 227,222        | 257,014        | 280,277        |
| Steam Electric | 88,632         | 140,596        | 176,113        | 229,961        |
| <b>Total</b>   | <b>414,742</b> | <b>489,280</b> | <b>542,082</b> | <b>617,865</b> |

Source: Texas Water Development Board.

irrigation and manufacturing will decrease significantly, dropping to less than 9 percent and 4 percent, respectively, of total water use in 2060. The other two water use sectors, livestock and mining, currently account for small percentages of Central Texas' water use and are expected to shrink further by 2060; the actual volume of water used for mining in 2060 is projected to be only a fraction of what it was in 2000 (**Exhibit 18**).<sup>3</sup>

## Surface Water

Parts of three of the state's largest rivers (the Brazos, Trinity and Colorado) lie within or border the Central Texas region, along with numerous smaller streams and tributaries including the Leon, Bosque, and Nava-sota rivers (**Exhibit 19**).

These streams and the reservoirs built into them provide 51 percent of the region's water. Municipal uses account for more than half of all the 217,415 acre-feet of surface water used.

The region has 14 major reservoirs, including Lake Whitney and Fairfield Lake (**Exhibit 20**).

Exhibit 19

## Central Texas Streams, Major Rivers and River Basins



Sources: Texas Water Development Board.



Central Texas contains portions of the territories of two river authorities that manage intrastate surface waters. The Trinity River

Authority has jurisdiction over its river from Tarrant and Dallas counties down to the top of Galveston Bay, including the northeastern corner of Grimes County and most of Madison, Leon and Freestone counties. The Brazos River Authority manages the river whose basin covers most of the region, with the river bed forming part of the boundaries of eight of its counties.

Climate

Central Texas’ moderate climate supports the natural beauty of its rolling prairies, river bottoms and wooded hills. According to the *Texas Almanac*, the region, except on its western edge, typically experiences its first freeze between December 1 and December 15; in the two westernmost counties of Lampasas and San Saba, freezing temperatures can arrive two weeks earlier. The last freeze usually comes between March 1 and March 16, with San Saba again the exception, averaging a last freeze date of March 31. Average lows in January range from 30.4°F in Lampasas County to 40.0°F in Grimes County; average highs in July range from 92.0°F in Mills County to 96.7°F in Burleson, McLennan and Washington counties.

Groundwater

In 2006, groundwater supplied 49 percent of the Central Texas region’s total water use (**Exhibit 21**). Several counties in the region actually consume much more groundwater than surface water, particularly Brazos County, despite bordering rivers on three sides. These counties have significant

Exhibit 20

Major Water Supply Reservoirs, Central Texas Region

| Reservoir Name               | River Basin | Year 2010 Projected Yield (acre-feet) | Conservation Storage Capacity (acre-feet) |
|------------------------------|-------------|---------------------------------------|---|
| Alcoa Lake                   | Brazos      | 7,800                                 | 15,650                                    |
| Aquilla Lake                 | Brazos      | 12,437                                | 45,092                                    |
| Belton Lake                  | Brazos      | 211,856                               | 435,225                                   |
| Bryan Utilities Lake         | Brazos      | 85                                    | 15,227                                    |
| Fairfield Lake               | Trinity     | 1,567                                 | 44,169                                    |
| Gibbons Creek Reservoir      | Brazos      | 6,310                                 | 32,084                                    |
| Lake Creek Lake              | Brazos      | 9,991                                 | 8,400                                     |
| Lake Limestone               | Brazos      | 63,519                                | 208,015                                   |
| Somerville Lake              | Brazos      | 43,149                                | 147,095                                   |
| Stillhouse Hollow Lake       | Brazos      | N/A                                   | 227,771                                   |
| Tradinghouse Creek Reservoir | Brazos      | 4,120                                 | 35,110                                    |
| Twin Oak Reservoir           | Brazos      | 2,725                                 | 30,319                                    |
| Lake Waco                    | Brazos      | 79,869                                | 144,546                                   |
| Lake Whitney                 | Brazos      | 18,336                                | 553,344                                   |
| Total                        |             | 461,764                               | 1,942,047                                 |

Note: Stillhouse Hollow Lake operates as part of a system; no individual yield total is available.  
Source: Texas Water Development Board.





irrigation demands, and a couple (including Brazos) also use groundwater for municipal supplies. The region uses groundwater for three-fourths of its irrigation water supply, but the share devoted to irrigation is diminishing as municipal and electricity water demand grows.<sup>4</sup>

Groundwater comes from aquifers, water-bearing layers of permeable rock, sand or gravel within the earth. The region sits above the middle sections of two major aquifers and two minor ones. A small part of the large Gulf Coast Aquifer lies under Washington, Brazos and Grimes counties, and a tiny portion of the Edwards Aquifer extends into Bell County as well (**Exhibits 22 and 23**).<sup>5</sup>

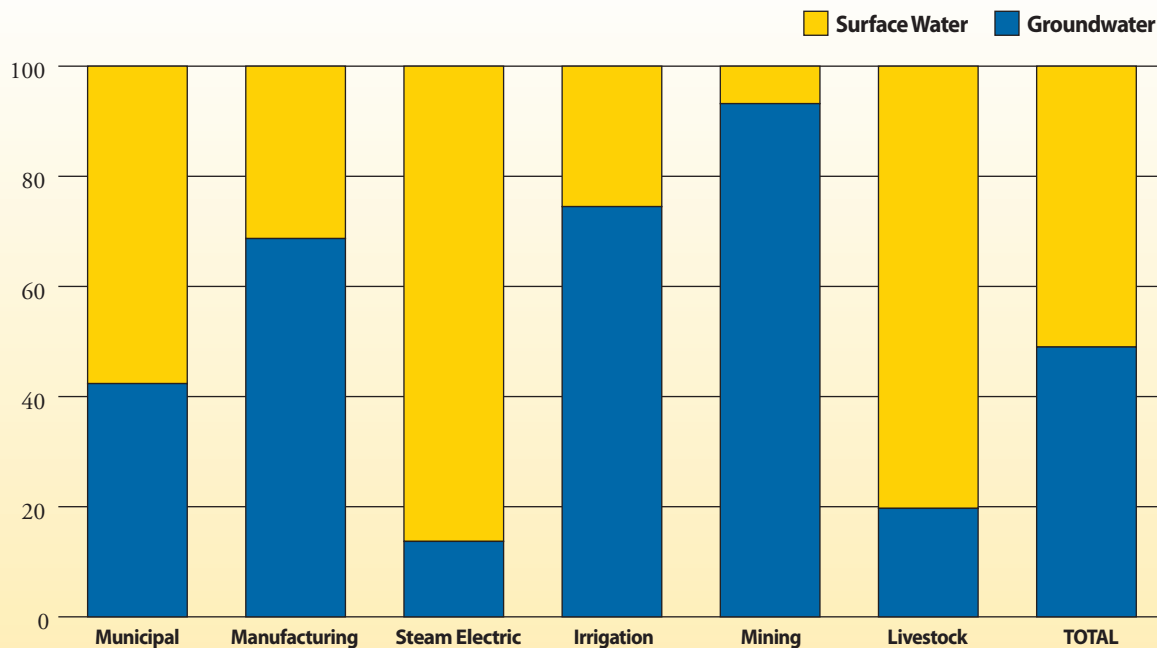
State laws approved in 1999 and 2001 encourage the use of groundwater conservation districts (GCDs), led by locally elected or appointed officials, to manage groundwater sources. The Central Texas region currently has 10 GCDs, two of them pending confirmation by local election.<sup>6</sup>

Groundwater conservation districts have some options to restrict groundwater pumping to maintain aquifer sustainability. One Central Texas district, Clearwater Underground WCD in Bell County, has ad valorem taxing authority, while the others do not. State law generally allows districts to receive revenue through fees, bond proceeds, investments, grants and loans, depending

*The region uses groundwater for three-fourths of its irrigation water supply, but the share devoted to irrigation is diminishing as municipal and electricity water demand grows.*

Exhibit 21

### Central Texas Region Water Sources, by Sector, 2006



In acre-feet:

|  |         |        |        |        |       |        |         |
|--|---------|--------|--------|--------|-------|--------|---------|
|  | 112,045 | 16,031 | 40,363 | 23,623 | 692   | 24,661 | 217,415 |
|  | 82,352  | 35,245 | 6,408  | 69,065 | 9,411 | 6,056  | 208,537 |

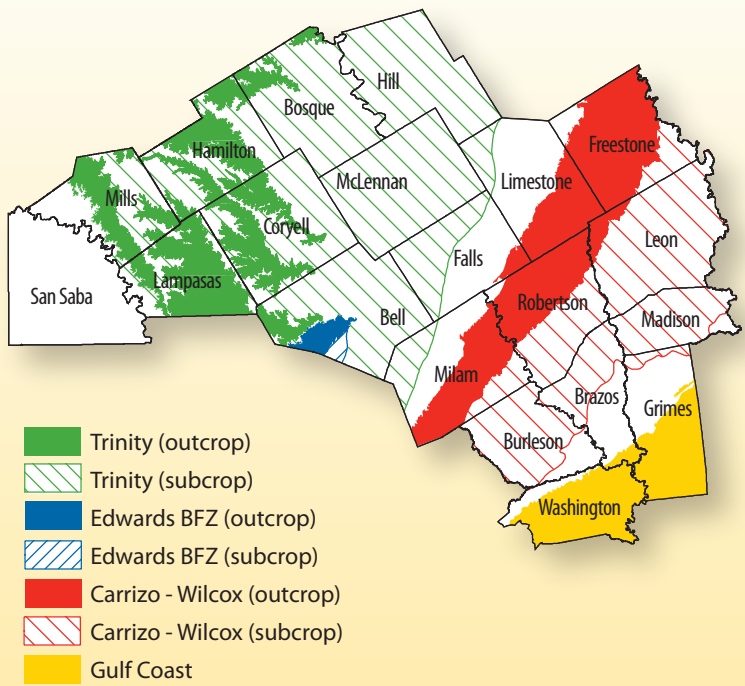
Source: Texas Water Development Board.





Exhibit 22

Central Texas Major Aquifers



Sources: Texas Water Development Board.

on the wording of the statute creating the district.

As noted earlier, the region’s water use for electricity generation is projected to increase rapidly, and its growing population will likewise demand a greater share of available water for municipal use. Conservation strategies will be an important part of maintaining the area’s supplies, especially in light of the possibility of more frequent and harsher droughts being an effect of a changing climate.

Parks and Recreational Opportunities

The Central Texas region has abundant recreational facilities, from hiking trails and fishing opportunities to white-water kayaking and rafting on area rivers. Central Texas has something for every outdoor enthusiast.

State Parks

The region’s state parks and recreational lakes offer a variety of outdoor recreational opportunities. Lake Whitney and Fort Parker state parks have the largest economic impact on the region.

Lake Whitney State Park, located on the eastern shore of this reservoir formed from the Brazos River, is about 30 miles north of Waco. Well known to anglers, the park also offers bird and wildlife watching, boating, mountain biking, camping and picnicking in a prairie landscape. Its 955 acres of parkland was originally leased from the U.S. Army three years after the lake’s creation in 1951; the park opened in 1965. Fishing from the shore or a boat provides good opportunities to land some of Texas’ most popular sport fish, including white, striped,

Exhibit 23

Aquifers, Central Texas Region

| Aquifer Name                  | Availability (acre-feet in 2010) |
|-------------------------------|----------------------------------|
| Carrizo-Wilcox                | 1,014,753                        |
| Edwards (Balcones Fault Zone) | 373,811                          |
| Gulf Coast                    | 1,825,976                        |
| Trinity                       | 205,799                          |
| Queen City                    | 295,791                          |
| Sparta                        | 50,511                           |

Note: Queen City and Sparta are designated as minor aquifers by the Texas Water Development Board.  
Source: Texas Water Development Board.



## Mother Neff, Mother of Texas State Parks

At less than 300 acres, Mother Neff State Park is not one of the larger parks in Texas. It does, however, hold a unique place in the state park system — in a way, it was the first.

According to Texas Parks and Wildlife, Mrs. Isabella Eleanor Neff moved to Texas as a newlywed in 1854, settling along a tributary to the Leon River, near the top of the present-day Lake Belton reservoir. Her youngest son in the family of nine children went on to become Texas governor in 1921. After his mother's death in that year, Governor Neff carried out her wish to donate a six-acre picnic area to the public that had been enjoying it for more than 15 years.

Within a couple of years, the governor called on the Legislature to begin setting aside lands for parks in Texas, and served as a member of the first State Parks Board. The board initially received no funds for purchasing or developing land for parks, and the Depression slowed the process even further. Nevertheless, Mrs. Neff's original public land donation, expanded by her son's addition of another 250 acres, provided the impetus for the establishment of Mother Neff State Park in 1934. In that year, the Civilian Conservation Corps began its multi-year job of developing facilities for the park, including roads, a water tower, a recreation hall and other buildings. They also discovered archeological artifacts of the Tonkawa Indians who had lived in the area when the Neffs first arrived.

Although other locations became official state parks before Mother Neff, the picnic grounds alongside the Leon River were the first public parklands in Texas and the inspiration for Governor Neff's passionate pursuit of ways for Texans to enjoy the scenic beauty of their state. Thus, Mother Neff State Park is commonly thought of as Texas' first.<sup>7</sup>

smallmouth and largemouth bass, sunfish, crappie and catfish.

The Brazos River valley has been inhabited since prehistoric times. More recently, Native American tribes such as the Comanche, Wichita and Taovaya Indians lived in the area during the 1800s when settlers from the East began to arrive. Lake Whitney was allowed to inundate the ruins of Towash, a town mostly abandoned in the late 19th century when the railroad bypassed it and came to the nearby town of Whitney.<sup>8</sup>

Lake Whitney State Park had almost 84,700 visitors in fiscal 2007. Visitors in fiscal 2006 (the latest data available) spent more than \$1 million in the area. The park's total economic impact on sales in Hill and Bosque counties is estimated at more than \$1.9 million annually.<sup>9</sup>

Fort Parker, near Mexia in Limestone County, was built by the Civilian

Conservation Corps (CCC) on land donated in 1935, and opened in 1941. It bears the name of the historic fortified settlement where, a century earlier, a Comanche raid resulted in the abduction of Cynthia Ann Parker, a girl who lived as a Comanche for the rest of her life and who was the mother of Chief Quanah Parker. In addition to the nearby reconstructed fort, also built by CCC, some remnants of local history are contained within the park's boundaries. The town of Springfield was the original county seat in the mid-19th century, but dwindled away after the railroad bypassed it. A cemetery located beside the park road is all that remains of Springfield.

Fort Parker State Park offers swimming, fishing and boating in the lake created by CCC's dam on the Navasota River, as well as wildlife and bird watching, hiking, biking,



camping and canoe rentals. The CCC-built facilities include a group camp with air-conditioned barracks and a dining hall, as well as picnic sites and shelters and campsites with water and electricity.<sup>10</sup>

In fiscal 2006, visitors to Fort Parker State Park spent almost \$560,000 in the area. The park had a total economic impact on sales in Limestone County of nearly \$1.1 million. Fort Parker had more than 93,000 visitors in fiscal 2007.<sup>11</sup>

**Exhibit 24** summarizes the economic impact of state parks in the Central Texas region. In addition to these parks, the region is also home to the Lake Somerville State Park Complex, Colorado Bend State Park and the Washington-on-the-Brazos State Historical Site. These state parks had a combined 2007 visitation of more than 307,000 people.<sup>12</sup>

Recreational Lakes and Reservoirs

The Central Texas region’s numerous lakes and reservoirs offer recreational activities including boating and fishing (**Exhibit 25**).<sup>13</sup>

Fishing and Hunting

Central Texas offers a variety of freshwater fishing opportunities. The region’s lakes support several types of bass; all types of catfish; both types of crappie (black and white); and several types of sunfish, as well as red drum in a few locations.<sup>14</sup>

Every county in the region offers some sort of legal hunting, with some variations in permit requirements for antlerless deer, bag limits for deer and squirrels and whether turkey hunting is permitted.

San Saba is the only county in the region permitting the hunting of javelina, from October 1 to February 24 in the 2008-09 season with a bag limit of two. In Brazos, Falls, Freestone, Grimes, Limestone, Madison and Robertson counties, no turkey hunting is allowed; antlerless deer can be hunted by permit only; and bag limits for white-tail deer are set at three, including no more than one buck and no more than two antlerless deer.

Hill, McLennan and Milam counties have that same bag limit for deer, but Hill and Milam have turkey hunting (only for the month

Exhibit 24

State Parks, Central Texas Region

| Name                      | Number of Visitors 2007 | 2006 Total Economic Impact on Sales | 2006 Spending by Visitors |
|---------------------------|-------------------------|-------------------------------------|---------------------------|
| Lake Whitney State Park   | 84,694                  | \$1.9 million                       | \$1 million               |
| Fort Parker State Park    | 93,123                  | \$1.1 million                       | \$560,000                 |
| Meridian State Park       | 44,126                  | \$760,000                           | \$350,000                 |
| Fairfield Lake State Park | 53,650                  | \$680,000                           | \$150,000                 |
| Mother Neff State Park    | 19,313                  | \$390,000                           | \$140,000                 |
| Fort Boggy State Park     | 12,648                  | \$150,000                           | \$35,000                  |

Sources: Texas Coalition for Conservation and Texas Parks and Wildlife Department.



of April 2009 in Milam), and McLennan County does not require a permit for antlerless deer. All counties with a three-deer bag limit except McClellan provide an exception to the antlerless permit requirement from Thanksgiving Day through the Sunday immediately following Thanksgiving, except in areas where a special permit is required.

Mills and San Saba counties have a late deer season from January 5 to 18, in addition to their general deer seasons. The bag limit for their combined seasons is five deer with no

more than two bucks allowed. Otherwise, all general hunting regulations are in force in the Central Texas region (**Exhibit 26**).<sup>15</sup>

In 2007, hunting and fishing enthusiasts in the Central Texas region purchased about 150,000 licenses from the Texas Parks and Wildlife Department, at a cost of more than \$4.2 million. All revenue collected from the sale of hunting and fishing licenses goes to a dedicated state fund set up for the protection, regulation and conservation of the state's fish and wildlife.<sup>16</sup>

## Exhibit 25

### Recreational Lakes and Reservoirs, Central Texas Region

| Name                         | Location                              | Size         | Maximum Depth |
|------------------------------|---------------------------------------|--------------|---------------|
| Aquilla Lake                 | 35 miles north of Waco                | 3,020 acres  | 59 feet       |
| Belton Lake                  | 5 miles northwest of Belton           | 12,385 acres | 124 feet      |
| Fairfield Lake               | 5 miles northeast of Fairfield        | 2,159 acres  | 49 feet       |
| Fort Parker State Park Lake  | South of Mexia                        | 725 acres    | 6 feet        |
| Gibbons Creek Reservoir      | 20 east of College Station            | 2,770 acres  | 34 feet       |
| Lake Bryan                   | 5 miles west of Bryan                 | 829 acres    | 45 feet       |
| Lake Limestone               | 15 miles southeast of Groesbeck       | 12,553 acres | 43 feet       |
| Lake Mexia                   | 7 miles west of Mexia                 | 1,048 acres  | 20 feet       |
| Lake Waco                    | Within the Waco city limits           | 8,465 acres  | 90 feet       |
| Lake Whitney                 | 30 miles northwest of Waco            | 23,500 acres | 108 feet      |
| Somerville Lake              | 30 miles southwest of College Station | 11,456 acres | 38 feet       |
| Stillhouse Hollow Lake       | 5 miles west of Belton                | 6,429 acres  | 107 feet      |
| Tradinghouse Creek Reservoir | 7 miles east of Waco                  | 2,010 acres  | 42 feet       |

Source: Texas Parks and Wildlife Department.



## Exhibit 26

**Bag Limits and Other Applicable Hunting Regulations, Central Texas Region, 2008-09**

| Animal            | Season  |
|-------------------|---|
| White-tailed Deer | <p>Open season lasts from November 1 until January 4. The limit is two antlerless deer and two bucks, with no more than one buck having an inside spread of 13 inches or greater.</p> <p>Archery season lasts from September 27 until October 31. Antlerless deer may be hunted without a permit unless the Texas Parks and Wildlife Department (TPWD) has issued antlerless managed land deer permits to help control the deer population.</p> <p>A special youth-only season occurs twice a year on October 25 and 26, and January 17 and 18.</p> |
| Squirrel          | No closed season except in Freestone, Limestone and Robertson counties, where open season lasts from October 1 until February 1 and May 1 – 31. There is no bag limit except in Burleson, Falls, Freestone, Limestone, Madison, Milam and Robertson counties, where the daily limit is ten.   |
| Turkey            | <p>Fall open season is from November 1 to January 4, and spring season (for Rio Grande gobblers only) runs from April 4 to May 17. The annual bag limit for Rio Grande and Eastern turkey is four, no more than one of which may be an Eastern turkey. Counties with an Eastern turkey spring season have no fall turkey season.</p> <p>Archery only: September 27 – October 31.</p> <p>Special youth-only season: March 28 – 29 and May 23 – 24.</p>   |
| Quail             | October 25 – February 22. Daily bag limit: 15; possession limit: 45.  |
| Dove              | Central Zone: September 1 – October 30 and December 26 – January 13 with no limit.  |

Source: Texas Parks and Wildlife Department.

**Energy**

The Central Texas region, like the rest of Texas, depends on reliable energy for its success and prosperity. The region is fortunate to include part of the Giddings Field, once a top producer of both oil and natural gas.<sup>17</sup> Today, fossil fuels continue to produce a share of the region's energy.

**Oil and Natural Gas**

The Giddings Austin Chalk Field stretches from Mexico through Central Texas and into northwest Louisiana. Between 1993 and 1997, the Giddings Field produced more natural gas and crude oil than any other field in Texas.<sup>18</sup> While both oil and gas production from the Giddings Field has

fallen, drilling continues and exploration companies are still acquiring mineral rights in the historic field.<sup>19</sup>

According to the Texas Railroad Commission, the region has about 3,282 active oil wells, with the largest concentrations in Burleson County (997 wells), Milam County (932 wells) and Brazos County (467 wells).<sup>20</sup> The region also has about 5,848 active natural gas wells. The largest concentrations of these are in Freestone County (2,725 wells), Limestone County (1,054) and Robertson County (722 wells).<sup>21</sup>

The Comptroller estimates that the Central Texas region's oil and natural gas industry accounted for more than 4,902 jobs and nearly \$284 million in earnings in 2007.<sup>22</sup>



Exhibit 27

**Active Coal Mines, Central Texas Region, 2007**

| Name            | County                      | Company                     | Production (in tons) |
|-----------------|-----------------------------|-----------------------------|----------------------|
| Jewett E/F Mine | Freestone & Leon            | Texas Westmoreland Coal Co. | 5,169,675            |
| Three Oaks Mine | Milam & Lee                 | Alcoa Inc.                  | 4,284,599            |
| Big Brown Mine  | Freestone                   | Luminant Mining Co.         | 3,515,809            |
| Calvert Mine    | Robertson                   | Walnut Creek Mining Co.     | 1,902,877            |
| Jewett Mine     | Leon, Limestone & Freestone | Texas Westmoreland Coal Co. | 1,630,993            |
| Kosse Mine      | Robertson & Limestone       | Luminant Mining Co.         | 196,806              |
| <b>Total</b>    |                             |                             | <b>16,700,759</b>    |

Source: Texas Railroad Commission.

**Coal**

The Central Texas region, particularly Freestone, Lee, Milam, Leon, Robertson and Limestone counties, produces a significant amount of lignite coal. Lignite, the lowest-quality coal, is used almost entirely for electricity generation or to create heat for industrial processes such as smelting. The region contains six of Texas' 12 operating lignite mines and produced 16.7 million tons

of coal in 2007, about 41 percent of the state total (**Exhibit 27**).

Three mines in the region, Jewett E/F, Three Oaks and Big Brown, are among the top producing Texas lignite mines. The region's mines support coal-fired electricity generation plants as well as industrial facilities in the state. In 2007, the region's lignite mining accounted for more than 745 jobs and more than \$52 million in earnings.<sup>23</sup>

**Waco Snack Food Company is Energy Leader**

The Environmental Protection Agency (EPA) has recognized Waco's Mars Snackfood US as an award-winning energy partner for the company's recent innovative landfill gas project. In May 2008, the candy maker began powering its furnaces with methane gas from Waco's landfill, creating many economic and environmental benefits for the Central Texas region.

According to EPA, the company will save an estimated \$600,000 per year in energy costs from the landfill gas project. This is the equivalent of the energy needed to heat 2,700 average homes. Mars says this renewable energy source will reduce the plant's greenhouse gas emissions by more than 10,000 metric tons annually, the equivalent of taking 1,900 passenger vehicles off the road.

EPA's recognition of the company through its Landfill Outreach Methane Program highlighted the community education and outreach efforts that were important to the project's success. The city of Waco, McLennan County and the EPA are all important partners in this endeavor. EPA estimates 520 more landfills across the country could be developed for similar types of landfill gas initiatives.<sup>24</sup>





Exhibit 28

**Percentage of Electricity Generated by Fuel Type, ERCOT, 2008**

| Fuel Source   | ERCOT       |
|---------------|-------------|
| Natural Gas   | 46%         |
| Coal          | 37          |
| Nuclear       | 13          |
| Wind          | 3           |
| Oil           | 0.5         |
| Hydroelectric | 0.5         |
| <b>Total</b>  | <b>100%</b> |

Note: Fuel Source totals have been rounded.  
Sources: Electric Reliability Council of Texas and Southwest Power Pool.

Utility Rates and Services

Central Texas is served by a single electric grid operated by the Electric Reliability Council of Texas (ERCOT), which manages 85 percent of Texas’ electricity flow. In cooperation with ERCOT, numerous electric providers use this grid to operate in the Central Texas region.

**Exhibit 28** shows the fuel sources used to provide power to the Central Texas region.<sup>25</sup>

Texas began deregulating its retail electricity market in 2002. This deregulation, however, applies only to investor-owned

**Texas Sports Hall of Fame**

During the 1949 Texas High School Coaches Association All Star Games in Beaumont, sports editor Thad Johnson of *The Beaumont Enterprise* addressed a meeting of the Texas Sportswriters Association at the Beaumont Hotel, suggesting they start a Texas Sports Hall of Fame. Johnson’s idea gained approval and the hall of fame was established as a nonprofit organization in 1951 in Grand Prairie.<sup>26</sup>

Although the hall did not have a permanent location for its first 30 years, more than 120 athletes were inducted. After a fundraising effort by the Texas Sports Writers Association, construction began in 1980 on a two-story Grand Prairie building to house various sports memorabilia, including items from legendary jockey Willie Shoemaker, track and field gold medalist Bobby Morrow, and golf clubs of WPGA co-founder and multi-sport champion Babe Didrikson Zaharias. The original hall had academic programs focused on the science of sport and used its proceeds to fund various forms of financial assistance, and to make sporting events available to special populations and those in need. The Grand Prairie Hall of Fame closed in 1986 and was relocated to Waco in 1991.<sup>27</sup>

The hall is divided into the Texas Sports Hall of Fame, Texas Tennis Hall of Fame, Texas High School Football Hall of Fame, and Texas High School Basketball Hall of Fame. Visitors are offered an interactive tour of the history of Texas athletics, allowing them to sing along with Texas university school songs, compare their hand and shoe sizes with those of NBA greats, view the evolution of tennis rackets and see a Heisman Trophy up close. In addition, the Tom Landry Theater provides video clips of important sports moments in Texas history.<sup>28</sup>

Partly to honor collegiate Southwest Conference history, the Sports Hall of Fame is building an 18,000-square-foot facility that will include a Health, Fitness and Youth Education Center, focusing on literacy awareness. The expansion will also have galleries highlighting the 1969 “Big Shootout” between Texas and Arkansas and a theater honoring the member institutions of the Southwest Conference and the Cotton Bowl.<sup>29</sup>





utilities within the ERCOT region. Utilities owned by cities and rural cooperatives are not required to join the deregulated market.<sup>30</sup> The Central Texas region has municipally owned utilities in San Saba, Lampasas, Caldwell, Goldthwaite, Hearne, Brenham, College Station and Bryan, while other parts of the region are served by rural cooperatives. None of these have joined the deregulated market.<sup>31</sup> Residential electricity rates charged by the region's member-

owned cooperatives currently hover around 11 cents per kilowatt hour (kWh), which is slightly higher than the state average for member-owned cooperatives, which is 9.7 cents per kWh.<sup>32</sup> The state average across all sectors, including both member-owned cooperatives and private companies, is 13.2 cents per hour.<sup>33</sup>

**Exhibit 29** lists the region's municipal- and member-owned cooperatives and their service areas.

## Exhibit 29

**Municipally-Owned Utilities and Member-Owned Cooperatives, Central Texas Region**

| Entity Name                              | Service Area  |
|--|---|
| Bartlett Electric Cooperative            | Bell, Milam and Burleson counties   |
| Bluebonnet Electric Cooperative          | Milam, Washington and Burleson counties   |
| Brazos Electric Power Cooperative        | Brazos County   |
| Brenham Municipal Light and Power System | City of Brenham   |
| Bryan Texas Utilities                    | Brazos, Burleson and Robertson counties   |
| Caldwell City Government                 | City of Caldwell  |
| Central Texas Electric Cooperative       | San Saba County   |
| College Station Utilities                | City of College Station   |
| Comanche County Electric Cooperative     | Mills County  |
| Fayette Electric Cooperative             | Washington County   |
| Goldthwaite Utilities                    | City of Goldthwaite   |
| Hamilton County Electric Cooperative     | San Saba, Mills, Lampasas, Hamilton and Coryell counties                                  |
| Hearne Municipal Electric System         | City of Hearne  |
| Heart of Texas Electric Cooperative      | Hamilton, Coryell, Bosque, Bell, Milam and Falls counties                                 |
| Hilco Electric Cooperative               | McLennan and Hill counties  |
| Houston County Electric Cooperative      | Freestone and Leon counties   |
| Lampasas Public Utilities                | City of Lampasas  |
| Mid-South Electric Cooperative           | Madison and Grimes counties   |
| Navarro County Electric Cooperative      | Hill, Limestone and Freestone counties  |
| Navasota Valley Electric Cooperative     | McLennan, Hill, Limestone, Freestone, Robertson, Falls, Leon, Madison and Brazos counties |
| Pedernales Electric Cooperative          | San Saba, Lampasas and Bell counties  |
| San Bernard Electric Cooperative         | Grimes County   |
| City of San Saba Utilities               | City of San Saba  |
| United Cooperative Services              | Hamilton, Coryell and Bosque counties   |

Sources: Public Utility Commission of Texas and Texas Electric Cooperatives.



While much of the Central Texas region is rural, many areas, particularly those with larger cities such as Waco and Killeen, now receive service from private companies. Areas involved in the deregulated ERCOT market include parts of McLennan, Bell, Leon, Freestone, Falls, Coryell, Milam, Hamilton, Hill and Bosque counties.<sup>34</sup>

An increasing number of private companies provide retail electric service to customers in these areas. For example, citizens of downtown Waco can choose among eight utility providers that offer average prices ranging from 9.8 cents to 17.9 cents per kWh.<sup>35</sup>

## Transportation

The Central Texas region's 100-plus mile stretch of Interstate Highway 35 (IH-35) is critical to the state's transportation needs. IH-35 links the U.S. and Mexico, creating a primary trade corridor between the two countries. In addition to trucks carrying trade goods, Central Texas' highways receive significant use from daily commuters as well as travelers between Dallas-Fort Worth, Houston, Austin and San Antonio.

Privately owned rail lines also transport goods across the region. In addition, Central Texas is home to a number of public transit authorities as well as commercial airports in Waco, College Station and Killeen.

## Highways

The Texas Department of Transportation (TxDOT) builds and maintains the Texas highway system through local offices and alliances with contractors located around the state. TxDOT serves Central Texas from

offices in Brenham, Bryan, Hearne, Huntsville, Lampasas, Belton, Gatesville, Hillsboro, Marlin and Waco.

While the region has a vast network of roads, TxDOT has given the following priority in terms of repair and expansion projects:

- Interstate Highway 35, running north from Temple to Waco through Bell, McLennan and Hill counties;
- State Highway 31, which runs northeast from Waco through McLennan and Hill counties;
- U.S. Highway 190, which runs east from Lampasas to Temple and then southeast from Temple toward Bryan, crossing Lampasas, Coryell, Bell, Milam and Robertson counties;
- State Highway 6, which runs southeast from Waco to Bryan through McLennan, Falls, Robertson and Brazos counties;
- U.S. Highway 290, which runs east through Washington county; and
- Interstate Highway 45, which runs north from Madison County through Leon and Freestone counties.<sup>36</sup>

In all, the region has 6,856 centerline miles (miles traveled in a single direction regardless of the number of lanes) and 15,311 total lane miles of state highways. It has nearly 1 million registered vehicles that travel about 31 million miles daily. The state as a whole contains 79,975 centerline miles, 192,542 total lane miles and more than 21 million registered vehicles that travel nearly 490 million miles each day (**Exhibit 30**).<sup>37</sup>

Road construction for state, local and private sources in Central Texas accounted for more than 6,000 jobs and more than \$236 million in earnings in 2007.<sup>38</sup>



## Exhibit 30

**Highway Miles, Vehicle Miles Driven and Registered Vehicles,  
Central Texas Region, 2008**

| County Name                | Centerline Miles | Lane Miles     | Daily Vehicle Miles | Registered Vehicles |
|----------------------------|------------------|----------------|---------------------|---------------------|
| Bell                       | 596              | 1,510          | 6,268,077           | 256,862             |
| Bosque                     | 347              | 695            | 569,069             | 21,858              |
| Brazos                     | 325              | 892            | 3,386,180           | 131,721             |
| Burleson                   | 234              | 522            | 738,226             | 21,914              |
| Coryell                    | 327              | 684            | 971,551             | 53,048              |
| Falls                      | 347              | 733            | 748,537             | 16,455              |
| Freestone                  | 377              | 809            | 1,700,430           | 24,366              |
| Grimes                     | 292              | 615            | 969,533             | 29,508              |
| Hamilton                   | 288              | 580            | 386,223             | 11,352              |
| Hill                       | 494              | 1,075          | 2,240,197           | 40,780              |
| Lampasas                   | 213              | 490            | 579,554             | 23,303              |
| Leon                       | 389              | 833            | 1,521,701           | 22,707              |
| Limestone                  | 379              | 769            | 781,545             | 24,950              |
| Madison                    | 264              | 571            | 965,867             | 12,899              |
| McLennan                   | 654              | 1,670          | 5,868,411           | 201,880             |
| Milam                      | 335              | 691            | 902,620             | 29,308              |
| Mills                      | 210              | 451            | 263,393             | 7,018               |
| Robertson                  | 294              | 627            | 970,323             | 18,338              |
| San Saba                   | 216              | 436            | 165,223             | 7,672               |
| Washington                 | 275              | 658            | 1,237,829           | 40,039              |
| <b>Central Texas Total</b> | <b>6,856</b>     | <b>15,311</b>  | <b>31,234,489</b>   | <b>995,978</b>      |
| <b>Statewide Total</b>     | <b>79,975</b>    | <b>192,542</b> | <b>488,790,361</b>  | <b>21,171,729</b>   |

Source: Texas Department of Transportation.

### Trade Corridors

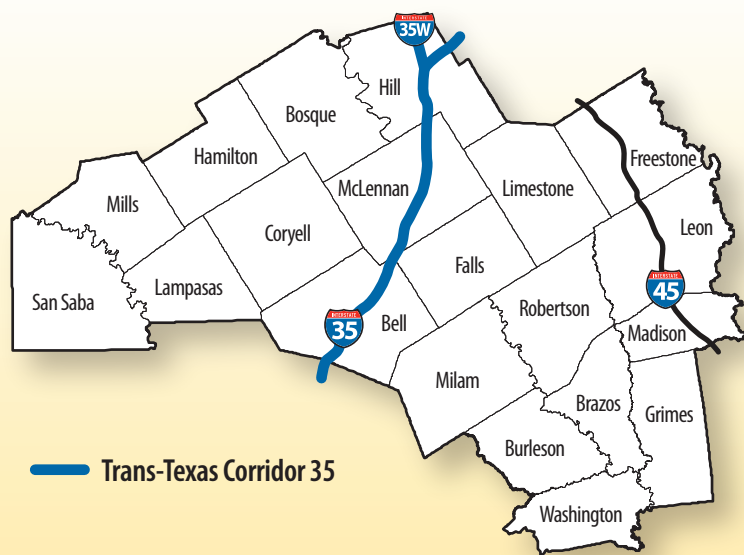
Interstate Highway 35 is the primary corridor for goods transported from Mexico and South Texas up through Central Texas and beyond. As the sole highway connecting Texas, Mexico, Canada and the heartland states, IH-35 is frequently used by trucks carrying goods imported from Mexico.<sup>39</sup> The Central Texas region receives high traffic volumes due in large part to trade of this nature

— in fact, the stretch of IH-35 through Waco serves about 50,000 vehicles per day.<sup>40</sup> To help manage traffic on this critical trade route, TxDOT is undertaking a number of initiatives to expand IH-35.

IH-35 expansions planned for Bell, McLennan and Hill counties over the next decade will add lanes to relieve traffic congestion. In some areas, road widening has already begun. For example, a current project



Exhibit 31

**Interstate 35 Trade Corridor**

Sources: Texas Department of Transportation.

**Freestone County Fair**

Each June, Freestone County and the city of Fairfield hold an annual County Fair and rodeo. A parade formally kicks off the event.

According to Patricia Robinson, secretary of the Fair Board, the fair is intended to promote agriculture programs for Freestone County youths. More than 200 children participate in Future Farmers of America (FFA) and 4-H-related events every year, involving some 400 projects. Many visitors come to the fair to participate in the market sale of animals, such as hogs and steers, generating more than \$400,000 in animal sales in 2008.

The fair also features presentations and exhibits in a variety of areas including home economics, whole food, nutrition and art projects.

The rodeo includes one night of youth rodeo and two nights of amateur rodeo for adults. The youth rodeo includes “mutton busting,” a version of bull riding using sheep and intended for small children. Kids also enjoy the fair’s annual carnival.

A number of events offer attractions for all ages. Adults at the fair can participate in old-fashioned gospel singing. Many people turn out each year for the class and family reunions that take place on the fair grounds. The event wraps up with a closing dance on Saturdays.

The fair brings in 1,500 to 2,000 visitors to the county each year.<sup>41</sup>

in Waco will expand IH-35 from six to seven lanes. Because truckers make up such a large share of travelers on IH-35, future projects in the Central Texas region may include separate truck-only lanes in addition to traditional all-traffic lanes (**Exhibit 31**).<sup>42</sup>

Such expansion projects fall under a broader TxDOT initiative to provide Texas with multimodal transportation between major metropolitan areas. Introduced by Governor Rick Perry in 2002 as the Trans-Texas Corridor, the large-scale plan initially called for one “super highway” with a 1,200-foot right of way across much of the state. Debate among Texas citizens, lawmakers and TxDOT has spurred changes to the plan over the past few years.

The current concept, renamed “Innovative Connectivity,” will no longer require a 1,200-foot right of way in most places, but still entails a score of regional projects to widen roadways as well as public-private partnerships to build toll roads. In conjunction with metropolitan planning organizations, the newly formed Corridor Segment Advisory Committees and other local entities, TxDOT is also considering commuter rail for some regions.<sup>43</sup>

**Public Transportation**

Waco and Bryan are the two largest urban areas in the region. Public transportation services in those cities are provided by Heart of Texas Rural Transit District and The District, respectively. Public transportation is available to smaller areas as well. College Station receives services from Texas A&M University Transit Services, while the city of Killeen is served by Hill County Transit District and Whitney citizens can use Whitney Dial-a-Ride (**Exhibit 32**).<sup>44</sup>



Exhibit 32

### Public Transportation Resources, Central Texas Region

| Public Transit Authorities            | Office Locations        | Counties Served  |
|---------------------------------------|-------------------------|--|
| Central Texas Hop                     | City of San Saba        | San Saba, Coryell, Hamilton, Lampasas, Milam, Mills            |
| The District                          | City of Bryan           | Brazos, Burleson, Grimes, Leon, Madison, Robertson, Washington |
| Heart of Texas Rural Transit District | City of Waco            | Bosque, Falls, Freestone, Hill, Leon, Limestone, McLennan      |
| Hill County Transit District          | City of Killeen         | Bell   |
| Texas A&M University Transit Services | City of College Station | Brazos   |
| Waco Transit System                   | City of Waco            | McLennan   |
| Whitney Dial-a-Ride                   | City of Whitney         | Hill   |

Source: American Public Transportation Association.

### Railways

Five railroad companies operate within the region, including two Class I railroads (classified as such for their large annual operating revenues), one regional railroad and two local railroads. Burlington Northern Santa Fe Company and Union Pacific Railroad Company operate the majority of tracks in the Central Texas region. Texas Pacific Transportation Limited, Gulf, Colorado & San Saba Railway and Rockdale, Sandow & Southern Railroad also operate in the area.<sup>45</sup> The region's rail lines run parallel to several highways including IH-35, Highway 6, Highway 190 and Highway 79 (**Exhibit 33**).

Railroads played a central role in the establishment and industrial growth of the Central Texas region. Killeen and Temple were both founded by the Gulf, Colorado & Santa Fe Railway Company in the late 1800s; in fact, both cities were named after men who represented the company. Railroad workers and nearby rural citizens settled the towns, opening shops, hotels, gristmills and

saloons.<sup>46</sup> Today, the Gulf, Colorado & Santa Fe Railway Company no longer exists, but several of its numerous rail lines are still being operated across the Central Texas region, shipping goods such as coal and timber to other parts of the state and beyond.

Exhibit 33

### Central Texas Rail Lines, 2009







## Air Quality

The Texas Commission on Environmental Quality (TCEQ) monitors the Waco metropolitan area's Air Quality Index (AQI) on a daily basis. According to TCEQ, the city's AQI score typically falls in the "good" range, between 0 and 50. Occasionally, the AQI climbs into the "moderate" range, between 51 and 100, with the critical monitored pollutants being ozone or small particulate matter. The Central Texas region has better air quality than many other areas around the state that include major urban centers.<sup>47</sup>

## Airports

The Central Texas region contains 24 airports, including commercial airports in College Station, Killeen and Waco.<sup>48</sup> Killeen-Fort Hood Regional Airport receives the highest traffic volume of any airport in the region; in 2007, more than 216,000 passengers boarded at Killeen-Fort Hood, up 3 percent from 2006 totals.<sup>49</sup> Many emotional departures and homecomings take place at this airport for soldiers flying to and from combat zones. American Eagle, Delta's Atlantic Southeast Airlines and Continental's Colgan Air all provide service to and from the Killeen airport.<sup>50</sup>

Easterwood Airport in College Station is the region's second-busiest, with more than 90,000 passenger boardings in 2007, up 6 percent from a year earlier.<sup>51</sup> American Eagle and Continental Airlines serve Easterwood.<sup>52</sup>

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# Health Care

**H**ealth care is a growing industry in Central Texas, and an important engine for job growth. Health care providers — both hospitals and companies providing home health care and physical therapy — are among the largest private employers in the region's metro areas.

In Waco, the top ten private employers include two hospitals and one home health care company. In Bryan-College Station, three of the top ten employers are hospitals. The ten largest private employers in the Killeen-Temple-Fort Hood metro area include a hospital and a home health care company.<sup>1</sup>

These providers contribute significantly to the region's economy. Healthcare occupations — doctors, nurses, medical technicians and administrators — generally are high-paying jobs. And health care access is closely tied with economic development, since a healthy work force is a productive one.

## Health Care Infrastructure

Hospitals are key factors in any state's health care infrastructure. They provide a central point for advanced medical services, encourage the growth of affiliated medical services in surrounding areas, and often are a major source of local employment. Scott and White Memorial Hospital, for instance, is among the ten largest employers in both the Killeen-Temple-Fort Hood metro area and Bryan-College Station. In Waco, Hillcrest

*Health care providers — both hospitals and companies providing home health care and physical therapy — are among the largest private employers in the region's metro areas.*

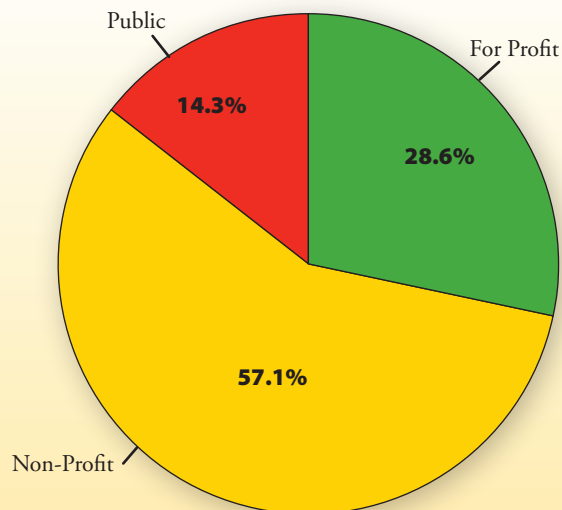


Biotechnology research at Texas A&M University.

PHOTO: Texas A&M University



Exhibit 35

**Central Texas Hospital Ownership, 2008**

Source: Texas Department of State Health Services.

Health System and Providence Health Center are among the largest private employers, as is Saint Joseph Hospital in Bryan.<sup>2</sup>

In all, Central Texas is home to eight for-profit hospitals, 16 nonprofit hospitals and four public hospitals (**Exhibit 35**).<sup>3</sup> Of these, Waco, Bryan and Temple each have three, while the remaining 25 hospitals are in smaller communities.<sup>4</sup>

Scott and White Memorial is the region's largest hospital, with 636 beds. Waco and

Bryan have the next-largest hospitals in the region. In 2008, the region's acute care hospitals — that is, hospitals treating patients for intensive or emergency care for a short period of time — had a total of 2,848 beds, while its psychiatric hospitals had 84 beds.<sup>5</sup>

Central Texas also has five hospital districts (**Exhibit 36**).<sup>6</sup> Under Texas law, these districts can levy taxes within their jurisdictions for the support of health care and hospital services.

Four of Central Texas' 20 counties have no hospital (**Exhibit 37**).<sup>7</sup> Some of their residents must travel relatively long distances to reach hospitals, which can be critical in emergency situations. For example, Leon County residents must travel for about 30 to 45 minutes to reach the nearest medical facilities in Palestine, Huntsville, Bryan-College Station and Madisonville.<sup>8</sup>

**Waco Hospitals Expand**

In Waco, a \$186 million project for Hillcrest Baptist Medical Center was one of the 10 largest construction projects breaking ground in Texas in 2006. The project includes a six-story medical center and a two-story women's and children's facility with 236 beds in all. Construction was completed in April 2009.<sup>9</sup> Hillcrest has the area's only Level II trauma center and nine neighborhood clinics.<sup>10</sup>

Another Waco project, worth \$48.5 million and launched in 2006, expanded the Providence Healthcare Network, doubling its number of emergency room beds and expanding operating rooms, intensive care rooms and space for a number of other medical services. The project was completed in Spring 2008.<sup>11</sup> Providence also operates

Exhibit 36

**Central Texas Region  
Hospital Districts**

|                                   |
|-----------------------------------|
| Burleson County Hospital District |
| Fairfield Hospital District       |
| Hamilton Hospital District        |
| South Limestone Hospital District |
| Teague Hospital District          |

Source: Texas Department of State Health Services.





a 64-bed psychiatric and substance abuse treatment facility, home health care services, hospice care and a residential facility that provides independent living, assisted living and long-term care. Seven Providence clinics in Waco provide outpatient care.<sup>12</sup>

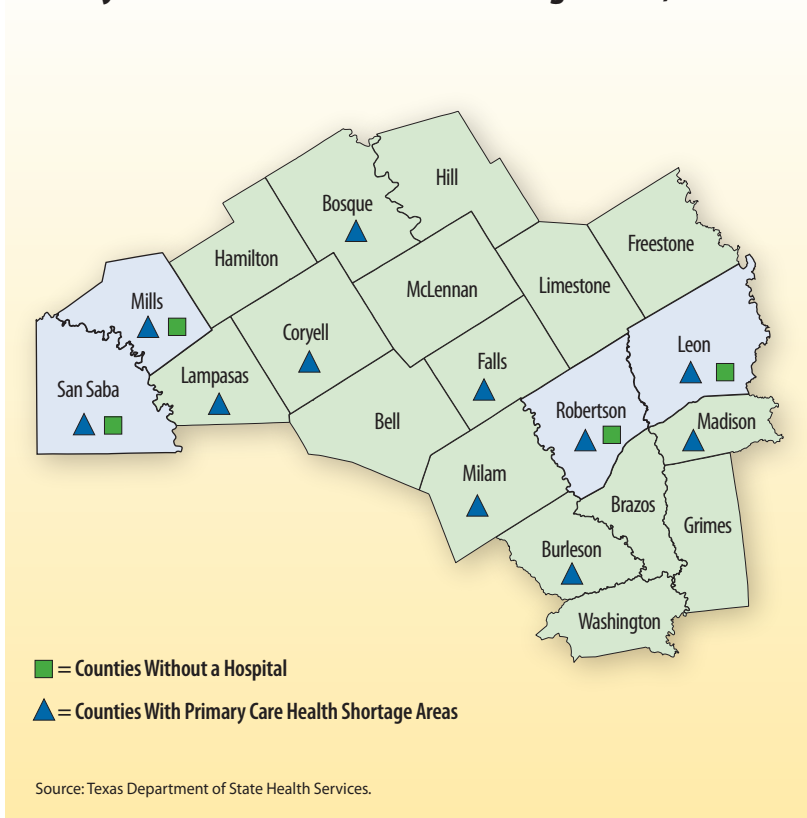
### Veterans' Health Care

Central Texas is home to the Central Texas Veterans Health Care System, which operates two Veterans' Affairs (VA) hospitals — Olin E. Teague Veterans Center in Temple and the VA Medical Center in Waco.<sup>13</sup>

The Central Texas Veterans Health Care System is an umbrella agency for both medical centers and numerous other veteran services. Serving veterans in 32 Texas counties, it includes one of the nation's newest VA hospitals, a large inpatient psychiatric facility, nursing home beds, a state veteran's home, a new research center and a rehabilitation center for the blind.<sup>14</sup> The system has medical school teaching affiliations with both the

Exhibit 37

### Central Texas Counties Without a Hospital and Primary Care Health Professional Shortage Areas, 2007



### Texas A&M Health Science Center

The 2007 Texas Legislature appropriated \$33 million to expand the existing Bryan-College Station and Temple campuses and to create a new Round Rock campus of the Texas A&M Health Science Center College of Medicine (HSC-COM). These funds will be dedicated to developing the existing programs at the Temple and Bryan-College Station campuses into full four-year programs. Currently, students are able to complete their first two years of basic science training at the two campuses. Afterwards, students must go to HSC-COM's clinical affiliates for clinical training for the remaining two years. In addition, a new two-year clinical campus will be established in Round Rock. The new facility would offer clinical teaching, student life and student service support, contain a simulation center with computer-programmed manikins and provide administrative support.

The funds are expected to allow HSC-COM to increase its basic science research faculty in Temple and Bryan-College Station and recruit talented educators and physician scientists. Of the \$33 million in appropriated funds, \$9 million was set aside for medical education at HSC-COM's new Round Rock campus.<sup>15</sup> Construction of the new Round Rock two-year campus began in late 2008 and should finish by fall 2009.<sup>16</sup> Although the Round Rock campus is yet to be fully constructed, 35 third and fourth year HSC-COM medical students are currently undergoing clinical training by working rotations in a wide range of Williamson County hospitals.<sup>17</sup>



## Texas Bioscience Institute

The Texas Bioscience Institute (TBI) in Temple was created to meet the Central Texas area's growing need for more bioscience and medical professionals. In 2006, TBI began offering qualified area high-school students college-level coursework in science, math and biotechnology in 11th and 12th grade. This dual-credit program allows students to earn college credit while in high school and to graduate with an Associate of Arts or Applied Science in biotechnology degree. Starting salaries for entry-level biotechnicians range from \$25,000 to \$30,000 per year.<sup>18</sup>

Temple College, a two-year community college, partnered with Scott & White Hospital, Texas A&M University College of Medicine, the Temple Health and Bioscience District, the City of Temple, area schools and other community partners to make TBI a reality. The partners provide instructors, internships, hands-on lab research opportunities and jobs for TBI students. In January 2007, Scott & White Hospital opened a state-of-the-art classroom and laboratory facility on its west campus that provides TBI students with the latest equipment and technology as well as proximity to faculty members and scientists.

TBI students are exposed to rigorous college courses in a medical setting that requires them to attend seminars led by scientists and physicians and obtain hands-on experience in medical research laboratories. TBI statistics show that their students have consistently met and exceeded regional test performance averages. The Texas High School Project notes that "TBI has made a significant contribution to the community by preparing under-represented — minority and female — students for a career in a medical field."<sup>19</sup> Sixty-five percent of the 2007-08 class of 108 students was female.<sup>20</sup>

TBI has received several recognitions and awards for innovation. At the national level, TBI program received the Bayer Foundation STEM K-12 "Best Practices" for strengthening K-12 Science, Technology, Engineering and Math (STEM) education. Within Texas, the program received the Texas High School Project T-STEM "Early Innovator" grant and recognition. TBI also received the 2007 Bellwether Award in the "Workforce Development" category in recognition of the partnerships it formed to promote community and economic development.<sup>21</sup>

Texas A&M Health Science Center's College of Medicine and the University of Texas Medical Branch in Galveston. Nurses, physicians' assistants, and other medical professionals are trained at the hospitals.<sup>22</sup>

In June 2008, the system enrolled its 10,000th veteran of the Afghan and Iraq wars, more than any other VA system in the U.S. (Combat veterans qualify for five years of health care from the Veterans Administration after leaving active service.)<sup>23</sup>

The system's Olin E. Teague Veterans' Center is the nation's fourth-largest medical complex of its kind, with more than 2,800 employees and an annual operating budget of more than \$97 million.<sup>24</sup> The Teague center

also opened a new clinic for spinal cord injuries in April 2008. The clinic has wide halls to accommodate wheel chairs and mechanical lifts to help transfer patients safely.<sup>25</sup>

Waco's 77-year old veterans' hospital and campus, once threatened with closure, has received new funding to expand its mission and improve the services it provides to veterans. A new \$3.5 million mobile magnetic resonance imaging (MRI) unit will be used at the hospital as well as at Fort Hood in Killeen and at the Olin E. Teague Center in Temple. The MRI unit will be used in the study of post-traumatic stress disorder (PTSD). The Waco VA Center is one of three centers nationwide studying PTSD and traumatic brain injuries.<sup>26</sup>





The Waco VA center also has received \$49 million in federal funding for a series of new projects and renovations. These include a new Center of Excellence for Research on Returning War Veterans to study mental health issues, as well as expanded mental health treatment services. The center's Blind Rehabilitation Unit will be expanded to 30 beds and other critical repairs will be undertaken.<sup>27</sup>

In addition, Bryan-College Station has a VA Community Based Outpatient Clinic (CBOC).<sup>28</sup> In 1995, the U.S. Veterans Health Administration (VHA) added CBOCs in an effort to improve the delivery of primary care to veterans.<sup>29</sup> The goals of the CBOC program include improved preventive care and early disease intervention.

In March 2009, the U.S. Defense Department announced that a portion of the federal stimulus funds would be used "to modernize its hospital system," and that a new hospital would be built at Fort Hood to treat soldiers and veterans. The new hospital will replace the existing Carl R. Darnall Army Medical Center, which was built in 1964 and has been expanded over the years. The first phase of the hospital construction is expected to cost \$621 million and construction is expected to last three years.<sup>30</sup>

Recently, the Central Texas Veterans Health Care System received 105 vouchers for housing homeless veterans in its service area. The vouchers, offered by the VA and the U.S. Department of Housing and Urban Development (HUD) to the Waco Housing Authority, provide for five years of housing in the Central Texas VA service area as well as case management services to assist veterans with budgeting, finding employment, child care and other needed services.<sup>31</sup>

## Psychiatric Care

The Texas Department of State Health Services' (DSHS's) Waco Center for Youth is a psychiatric residential treatment facility serving Texas children aged 13 to 17 with emotional or behavioral problems. The center is open to children who already are under the care of a DSHS facility or a community mental health and mental retardation center, or who are in the custody of the Texas Department of Protective and Regulatory Services.<sup>32</sup>

The region is scheduled to receive additional crisis mental health care services through state aid from DSHS. Waco's Heart of Texas Region Mental Health Mental Retardation Center, which provides mental health and mental retardation services for the residents of six Central Texas counties, received \$1.7 million from the state over two years to provide a 24-hour crisis center, including an observation unit and a 16-bed residential unit for short stays.

These new services will expand treatment options for people with mental health problems and ease the duties of local law enforcement personnel, who often spend hours waiting at local emergency rooms until persons can be evaluated for mental health issues, and who may have to transport them to another region if the local psychiatric hospital is full. The new center will provide mental health triage services that can help to quickly evaluate a person's mental status and refer them to appropriate treatment.<sup>33</sup>

## Health Professional Shortages and Rural Healthcare

The U.S. Department of Health and Human Services has designated 11 of the 20 counties in the Central Texas region as

*In March 2009, the U.S. Defense Department announced that a portion of the federal stimulus funds would be used "to modernize its hospital system," and that a new hospital would be built at Fort Hood to treat soldiers and veterans.*



### Scott & White Memorial Hospital

Scott & White Memorial Hospital is a private, nonprofit organization with about 8,000 employees. The hospital is Texas' largest multi-specialty practice and has a number of clinics throughout the Central Texas region. For five consecutive years, Scott & White has been on the Thomson Reuters 100 Top Hospitals National Benchmarks for Success list for major teaching hospitals. Thomson Reuters is a world leader in providing critical information on issues such as healthcare, and constructs its hospital ranking based on a national hospital scorecard that focuses on best practices.<sup>34</sup> And in 2008, for the ninth year in a row, Thomson Reuters named Scott & White one of the nation's top 100 hospitals for cardiovascular care.<sup>35</sup>

Scott & White also functions as a clinical educational site for the Texas A&M Health Science Center College of Medicine. Physicians at the hospital perform the dual roles of attending physician and professor to students.<sup>36</sup>

The hospital has continued to expand its presence in the Central Texas region. In 2007, Scott & White and Metroplex Health System, the primary healthcare providers for Coryell, Bell and Lampasas counties, have reaffirmed their strategic alignment agreement to expand medical services in Killeen. The new hospital is expected to have 70 to 120 beds and add up to 400 jobs to the local economy.<sup>37</sup>

The hospital also offers the Scott & White Health Plan, a nonprofit health maintenance organization (HMO). The plan, which began operation on January 1, 1982, currently covers 34 counties and has 200,000 members.<sup>38</sup> It is one of the state's highest-ranked HMOs.<sup>39</sup>

having a shortage of primary health care providers — primary care doctors, dentists and mental health professionals (**Exhibit 37**).<sup>40</sup>

Many of the region's 20 counties lack mental health professionals. In 2008, Washington, San Saba, Robertson, Mills, Madison, Limestone, Leon, Lampasas, Hill, Hamilton, Freestone, Falls, Burleson and Bosque counties had no psychiatrists working in their areas. Other counties were not much better off; Milam, Grimes and Coryell counties, had only one or two psychiatrists each.<sup>41</sup>

The region's most acute health care professional shortages, however, are in Burleson and Robertson counties. In 2008, Burleson County had a population of 18,483 and only three primary-care physicians, while Robertson County had 16,898 residents and just

four physicians. From 2000 to 2008, Burleson County's ratio of population versus primary-care physicians rose from 5,164 to 6,161 residents per physician. Over the same period, Robertson County improved slightly, from 4,288 to 4,225 residents per physician.<sup>42</sup>

This situation forces Burleson County residents to travel to the Bryan-College Station area for healthcare. Robertson County faces similar difficulties.<sup>43</sup>

One successful model for rural health care provision is College Station's Brazos Valley Health Partnership (BVHP), which was created in 2002 in response to a regional health assessment of a seven-county area — Brazos, Burleson, Grimes, Leon, Madison, Robertson and Washington counties — conducted by the Center for Community Health

*One successful model for rural health care is College Station's Brazos Valley Health Partnership, created in 2002.*



Development at the Texas A&M Health Science Center School of Rural Public Health.

BVHP has developed a model for rural health care called the “health resource center” — a single location that provides both health care and referral services, allowing medical providers to combine their efforts while reducing overhead costs. BVHP opened its first such center in Madisonville in 2003.<sup>44</sup> In 2004, the center began providing free transportation for county residents who need to travel to doctor’s visits and other medical services. In 2007, volunteer drivers provided more than 540 rides.<sup>45</sup>

Today, the health resource center refers people to services and works with other groups to provide audiology and child care management services. The county’s indigent health care program, Brazos Valley Community Action Agency, Brazos Valley Council on Alcohol and Substance Abuse, Early Childhood

Intervention, and the Medication Assistance Program all are housed in the center.<sup>46</sup>

BVHP also has helped to organize similar health resource centers in Burleson, Leon, and Grimes counties. Each is administered by a commission appointed by the county commissioner’s court. Office space for the centers has been donated by organizations such as the Madison St. Joseph Health Center, the Burleson County Hospital District, the Mental Health/Mental Retardation Authority of Brazos County, the Powell Memorial Health Clinic, Leon County and the Somerville Independent School District.<sup>47</sup>

### Treatment for the Uninsured

A recent U.S. Census Bureau report revealed that Texas had a two-year average (2006-2007) uninsured rate of 24.8 percent, the highest of any state.<sup>48</sup> Based on the U.S. Census Bureau’s Small Area Health Insurance

### Goodall-Witcher Healthcare Foundation

Founded in July 1966, the Goodall-Witcher Healthcare Foundation is a nonprofit corporation that owns and operates healthcare businesses in Bosque County and nearby areas, including a hospital and ancillary facilities. In addition to providing direct patient care, the foundation also offers nursing education, public education and emergency medical services.<sup>49</sup>

Today, the Goodall-Witcher Healthcare Foundation incorporates the 40-bed Goodall-Witcher Hospital, Clifton Medical Clinic, Goodall-Witcher Home Health Agency, Goodall-Witcher Nursing Facility and Meridian Medical Clinic, with approximately 240 employees.<sup>50</sup> The hospital offers in-patient medical, surgical, obstetrics, nursery and intensive care. The hospital’s Discharge Planning Program has designated nurses who work with the physicians, social workers, therapist and nursing staff to formulate details on how patients will receive the best care towards recovery during their time at the hospital.<sup>51</sup>

The Goodall-Witcher Home Health Agency provides health care at patients’ homes during recovery, such as rehabilitative therapies and exercises designed to increase patients’ mobility.<sup>52</sup>

In 2004, Goodall-Witcher Healthcare Foundation was selected for the 2004 Solucient Performance Improvement Leaders award, based on management and clinical outcomes over five consecutive years. The foundation was one of 20 small community hospitals that won the award nationwide, including three from Texas. The award was based on Goodall-Witcher’s mortality rates, expenses and lengths of stay.<sup>53</sup>



*Central Texas is home to Scott & White, one of three Texas hospitals to receive the American Heart Association's Get With The Guidelines Gold Performance Achievement Award.*

estimates, all 20 Central Texas counties had rates of uninsured residents of more than 20 percent. The lowest rate was in Limestone County, with an estimated 22.7 percent uninsured, and the highest rate was in Brazos County, with 36.3 percent uninsured.<sup>54</sup>

The number of uninsured is prompting many of the region's communities to explore ways to provide them with adequate and affordable health care. The Greater Killeen Free Clinic relies primarily on volunteer physicians and other medical professionals to operate its twice-weekly clinic. Only the uninsured in Killeen and surrounding communities can receive its services.<sup>55</sup> The clinic, founded in 1994, relies on a number of community organizations that contribute services to its patients. Among these are Bell County Public Health District, Metroplex Hospital, Scott and White Hospital and the Susan G. Komen Breast Cancer Foundation.<sup>56</sup>

In Bryan, Health for All is a free clinic that provides health care for uninsured area residents who cannot afford regular medical care. It also offers mental health services, lab and x-ray services and prescription drugs, as well as periodic clinics for vision and podiatry services.<sup>57</sup> In 2007, Health for All saw nearly 1,000 patients. Recently, the clinic doubled its number of exam rooms to eight, and hopes to hire a full-time physician. In addition, the Texas A&M Health Science Center's School of Medicine provides the services of its medical students under the supervision of a physician.<sup>58</sup>

### Heart Disease

Cardiovascular disease (CVD) is a term for heart problems caused by narrowed or blocked blood vessels (ischemic heart disease) that can

lead to a heart attack or stroke. In Texas, CVD is the leading cause of death, accounting for two out of every five deaths in the state.

Ischemic heart disease is of particular concern in Central Texas, where 11 of the region's 20 counties have mortality rates from this disease that are significantly higher than the average state rate (**Exhibit 38**). In four of the region's counties — Hill, Bosque, Limestone and Brazos — mortality rates from stroke are also much higher than the state average.<sup>59</sup>

Fortunately, Central Texas is home to Scott & White, one of three Texas hospitals to receive the American Heart Association's (AHA's) Get With The Guidelines (GWTG) Gold Performance Achievement Award. Scott & White received the award for meeting the highest standard of care for both coronary artery disease and stroke, as measured by nationally accepted standards and recommendations. Scott & White's heart care and stroke programs have been recognized in this way three times.<sup>60</sup>

Heart attack patients at hospitals that follow AHA guidelines experience lower death rates. One study found that hospitals not following AHA guidelines had death rates that were higher — 17.6 percent — than those of hospitals adhering to the treatment guidelines, which had lower death rates of 11.9 percent.<sup>61</sup>

In 2008, Scott & White's Heart and Vascular Institute launched the Women's Cardiovascular Health Clinic and a free online screening program called HeartAWARE. The online heart risk assessment tool evaluates a woman's risk of cardiovascular disease and, if its results show a high risk factor, invites the person in for a free screening at the clinic. The AHA notes that cardiovascular disease is the number-one killer of American women.



To help combat cardiovascular disease, Scott & White partnered with the Tem-Bel Health and Wellness Coalition, a group of Central Texas community leaders, to implement the National Institutes of Health's We Can! program to enhance children's activity and nutrition.

This national education program offers families tips to healthy eating and fun activities designed to encourage physical fitness. It also provides community groups and health professionals information to implement programs that encourage families to adopt a healthy lifestyle.<sup>62</sup>

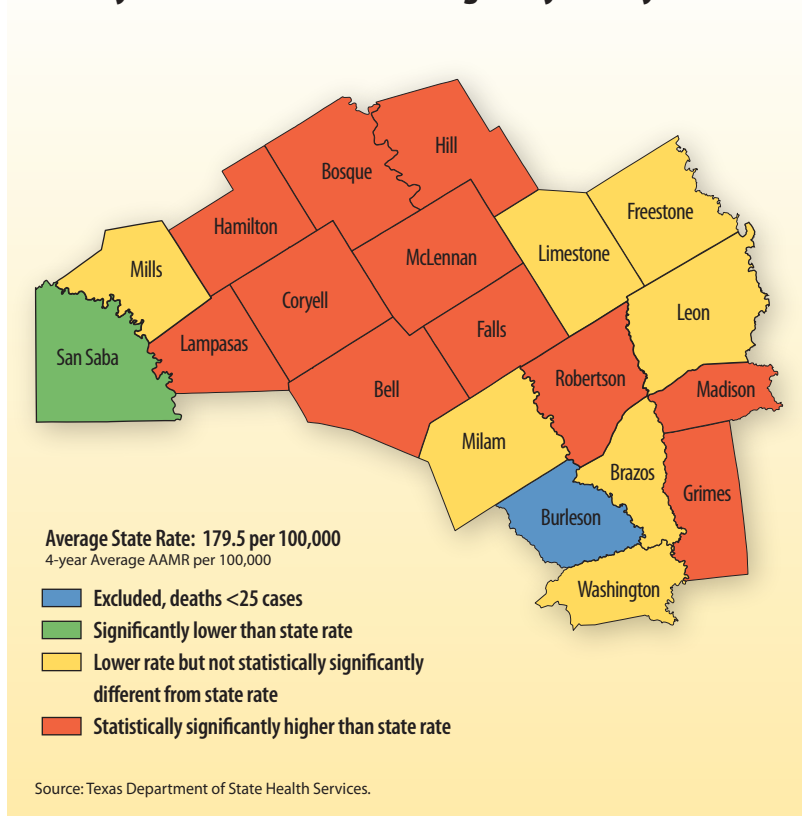
The Central Texas We Can! program has received two awards for its efforts to educate parents and children about the risk factors for heart disease and stroke, which include physical inactivity and poor eating habits. The honors include an Outstanding Program Award from the Texas Council on Cardiovascular Disease and Stroke and "Best Practices" recognition from the Texas Department of State Health Services.<sup>63</sup> Continued support of community efforts to help families and children adopt healthier lifestyle habits should help the Central Texas region reduce its rate of death due to heart disease.

## Endnotes

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Exhibit 38

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*To help combat cardiovascular disease, Scott & White partnered with the Tem-Bel Health and Wellness Coalition, a group of Central Texas community leaders, to implement the National Institutes of Health's We Can! program to enhance children's activity and nutrition.*





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- <sup>53</sup> Goodall-Witcher Healthcare Foundation, "Goodall-Witcher Named with Top 100 Hospitals," <http://www.gwhf.org/news-1.htm>. (Last visited March 15, 2009.)
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# Education

Education is the foundation for future economic growth. Developing a well-educated and highly skilled work force is essential for successful competition in the global economy.

## Public Education

About 4.1 percent, or more than 190,000, of the state's public elementary and secondary students attend school in the Central Texas region. The region is home to 110 public school districts with 467 campuses as well as ten charter districts and their 14 campuses.

The region's number of students has risen in recent years, growing by 8.6 percent from the 2001-02 to 2007-08 school years. This

increase represents a net gain of more than 15,086 students. The population of the region, state and nation rose by 7.1, 11.8 and 6.0 percent, respectively, over the same time period.<sup>1</sup>

During 2007-08, the region's largest independent school districts (ISDs) by enrollment were Killeen ISD in Bell County, with more than 38,000 students, and Waco ISD in McLennan County, with more than 15,000 students. The smallest districts were Rapoport Academy Prep School in McLennan County, with 51 students, and Transformative Charter Academy in Bell County, with 59 students.

The Central Texas region, like the rest of the state, has seen its public school population become more diverse and more Hispanic (**Exhibit 39**). Still, the region is less ethnically diverse than the statewide student population, which is 47.2 percent Hispanic,

*The Central Texas region, like the rest of the state, has seen its public school population become more diverse and more Hispanic.*



Baylor University School of Education.

PHOTO: Baylor University



Exhibit 39

**Ethnicity of Public School Students, Central Texas Region, 2001-02 vs. 2007-08 School Years**

| Ethnicity              | 2001-02 | 2007-08 |
|------------------------|---------|---------|
| White                  | 53.6%   | 48.9%   |
| Hispanic               | 21.6    | 26.4    |
| Black                  | 22.7    | 22.2    |
| Asian/Pacific Islander | 1.7     | 1.9     |
| Native American        | 0.4     | 0.5     |

Note: Totals may not equal 100 percent due to rounding.  
Source: Texas Education Agency.

34.8 percent white, 14.3 percent black, 3.4 percent Asian/Pacific islander and 0.3 percent Native American.

The region has seen an increase in its number of economically disadvantaged students. In 2001-02, nearly 85,000 students or 48.2 percent of total enrollment were identified as economically disadvantaged. In 2007-08, more than 101,000 students or 53 percent of the region's students were classified in this way, slightly less than the statewide average of 55.3 percent.

**Accountability**

Central Texas school districts compared somewhat favorably with statewide averages in the 2007-08 district accountability ratings established by the Texas Education Agency (TEA). The region exceeded the state average for Academically Acceptable ratings, and fared favorably with the statewide average for districts deemed Academically Unacceptable (**Exhibit 40**).

In August 2008, TEA rated four of the region's 113 districts as Exemplary; 27 as Recognized; 81 as Academically Acceptable; and one as Academically Unacceptable.

Central Texas also exceeded statewide averages in the number of campuses rated Academically Acceptable (**Exhibit 41**).

Of the 475 campuses in the region's districts, including charter schools, 25 were rated Exemplary; 162 were rated Recognized; 224 were Academically Acceptable; 23 were Academically Unacceptable; and 41 were listed as "Not Rated: Other" in 2007-08.

Six of the region's ten charter districts were rated Academically Acceptable while four were rated as Recognized. Five charter

Exhibit 40

**2007-08 Accountability Ratings, Central Texas School Districts**

| Rating                    | Region | Statewide |
|---------------------------|--------|-----------|
| Exemplary                 | 3.5%   | 3.5%      |
| Recognized                | 23.9   | 26.8      |
| Academically Acceptable   | 71.7   | 66.6      |
| Academically Unacceptable | 0.9    | 2.6       |
| Not Rated: Other          | 0.0    | 0.6       |

Note: "Not Rated: Other" includes campuses such as alternative education programs or early childhood education centers. These data include charter districts. Totals may not equal 100 percent due to rounding.  
Source: Texas Education Agency.

Exhibit 41

**2007-08 Accountability Ratings, Central Texas School Campuses**

| Rating                    | Region | Statewide |
|---------------------------|--------|-----------|
| Exemplary                 | 5.3%   | 12.2%     |
| Recognized                | 34.1   | 34.4      |
| Academically Acceptable   | 47.2   | 42.8      |
| Academically Unacceptable | 4.8    | 2.5       |
| Not Rated: Other          | 8.6    | 8.1       |

Note: "Not Rated: Other" includes campuses such as alternative education programs or early childhood education centers. These data include charter districts.  
Source: Texas Education Agency.





## If I Had a Hammer

The national 'If I Had a Hammer' project combines academic learning with hands-on activity. Classroom curriculum is combined with a construction team activity, enabling students to form groups to construct an eight-by-11-foot house in less than two hours. The finished product is a free-standing house with windows, front porch and door.

Through the project, students are able to learn the importance of teamwork, communication and real-life application of science and math concepts. By building the house and working through the classroom curriculum, students can better understand the application of math concepts, processes and functions, for instance by adding fractions to measure a room or applying sales tax to the budget.

In 2000, the 'If I Had a Hammer' project partnered with Blinn College to offer the program at the Bryan and Brenham campuses. The program is open to all fifth-grade students in Brazos, Burleson, Fayette, Grimes, Lee, Madison, Waller and Washington counties and parts of Austin, Milam, Montgomery, Robertson and Walker counties. Every year, more than 1,000 students participate in the program. The program is offered free of charge to the students and Blinn College pays all of the associated costs in annual license fee and purchasing of materials. Classes are taught by trained professionals in the area.<sup>2</sup>

Local businesses also can participate as sponsors. In return for sponsorships, business employees work as construction bosses to help students build houses; their company logos are printed on t-shirts handed out to the children.<sup>3</sup>

district campuses were rated as Recognized, eight as Academically Acceptable and one as Academically Unacceptable.

In 2008, among Central Texas districts that teach all grade levels, Crawford ISD in McLennan County had the highest percentage of students passing all Texas Assessment of Knowledge and Skills (TAKS) tests, at 92 percent. Itasca ISD in Hill County had the next largest share, at 89 percent. (An average for the Central Texas region is not available because TEA reports district data only as percentages.)

Within the region, all graduating students in Richland Springs and Cherokee ISDs took college entrance exams in the 2007-08 school year, greatly outpacing the statewide average of 65.8 percent. Of the 111 Central Texas districts for which data are available, 74 had participation rates above the state average.

College Station ISD had the highest percentage of test takers scoring at or above the criterion score used by TEA to measure college readiness, at 50.8 percent; slightly more than 82 percent of its graduating class took at least one of the tests. Across the state, 27.1 percent of students who took at least one of the tests scored at or above the criterion score.

## Outcomes

In 2008, 78 percent of Central Texas residents over the age of 25 had a high school diploma, a GED and/or some higher education, slightly above the statewide average of 75.7 percent.<sup>4</sup>

In the 2006-07 school year, 10,452 students graduated from the region's public high schools, representing about 4.3 percent of the statewide total for that year. Killeen

*In the 2006-07 school year, 10,452 students graduated from the region's public high schools, representing about 4.3 percent of the statewide total for that year.*



Shakespeare at Winedale

Shakespeare at Winedale was established in 1970 as a University of Texas at Austin (UT-Austin) English course. Today, it has grown into a year-round program dedicated to bringing Shakespeare to life through theatrical performance. The program was founded by Professor James B. Ayres, who believed that Shakespeare’s plays are best learned by performing them.

During the summer program, students spend two months studying and performing three plays in a converted nineteenth-century barn. The first part of the course focuses on preparing the students with source materials, texts, scholarship and criticism delivered through individual study and correspondence and conference courses. The second part of the class takes part at the Winedale Historical Center near Round Top.

A spring program is offered at the UT-Austin campus, with performances at Winedale. The class features a combination of studying the interpretive challenges of Shakespeare’s plays and exploring the plays through performance. The class requires that the students spend time at the University of Texas Winedale Historical Center to prepare for the public performances that will be held near the end of the course.

In addition, for 10- to 16-year-olds, UT’s Camp Shakespeare offers a two-week experience in performing and learning Shakespeare. This outreach program is offered to all young people and is held in the small town of Round Top.<sup>5</sup>

ISD had the largest number of graduates with 1,480, while the Temple Education Center had the smallest number, with just three graduates.

About 9.7 percent of the region’s students graduated under the state’s most stringent graduation plan, the Distinguished Achievement plan; 61.4 percent under the Recommended plan, which is the required plan; and 28.8 percent under the Minimum plan, a less stringent graduation plan that requires both parental and school approval, or

under an Individual Education Plan offered through Special Education (**Exhibit 42**).

School Finance

In the 2007-08 school year, the Central Texas region’s total school spending per pupil, including debt service, averaged \$9,930, which is 2.3 percent less than the statewide average of \$10,162.

Twenty-three Central Texas districts spent more than 20 percent above the statewide average. Another 51 districts, however,

Exhibit 42

2007 High School Graduates, Central Texas Region vs. Statewide

| Graduation Plan   | Region | Statewide |
|---|--------|-----------|
| Distinguished Achievement                                   | 9.7%   | 11.1%     |
| Recommended   | 61.4   | 66.8      |
| Minimum/IEP*  | 28.8   | 22.1      |
| Distinguished Achievement & Recommended as Percent of Total | 71.2%  | 77.9%     |

Note: Totals may not equal 100 percent due to rounding.  
Source: Texas Education Agency.





including the region's charter schools, spent less per pupil than the statewide average.

Excluding charter districts, which do not receive funding from local taxes, the region's lowest total tax rate in 2007 was that of Leon ISD, at 89.7 cents per \$100 of property value. Rogers ISD levied the highest rate at \$1.52. The statewide average was \$1.18 per \$100 of value; 98 districts in the Central Texas region had higher rates.

The region generated a lower percentage of its school revenue from local taxes (35.7 percent) than the statewide average (45.8 percent). Dew ISD received the largest portion of its school funding from local taxes (73 percent), while Westphalia ISD had the lowest share (11.3 percent). The region's share of revenue from other local sources, such as equity transfers and tuition, was a bit higher than the state's, at 7.1 percent versus 6.7 percent. Malone ISD gained 31.1 percent of its revenue from these other local sources, for the highest share in the region; Penelope ISD received the lowest share for its non-charter schools, at 2 percent.

Coolidge ISD had the lowest property wealth per pupil in 2007, at \$95,519, while Dew ISD led the region with \$2,963,265 per pupil. Dew ISD has high property values from oil and gas resources, with a relatively low number of students. The regional average was \$279,975, or 16 percent lower than the statewide average of \$333,420.

Texas law requires districts with relatively high property wealth per pupil to share it with less-wealthy districts through a process called "equity transfers." In 2007, 11 districts in the Central Texas region transferred roughly \$52.2 million, an average of \$282 per pupil. Fairfield ISD transferred the largest total

amount (\$15.6 million), while Dew ISD had the highest per-pupil transfer (\$25,935).

Among the non-charter districts, Priddy ISD received the largest share of revenue from the state in 2008, at 76.4 percent. Franklin ISD received the smallest state share, at 10.4 percent. The regional average for 2007 was 44.6 percent, slightly higher than the statewide average of 37.8 percent. The region also derived a higher share of its school funding from federal aid than the statewide average, at 12.5 versus 9.8 percent.<sup>6</sup>

## Teachers

In examining teacher salaries across the region, it should be remembered that average salaries vary with length of teacher tenure as well as wage levels. District A, for instance, may have a higher average salary than District B because it has a higher percentage of experienced teachers, even though its wage levels for various years of experience are lower than District B's.

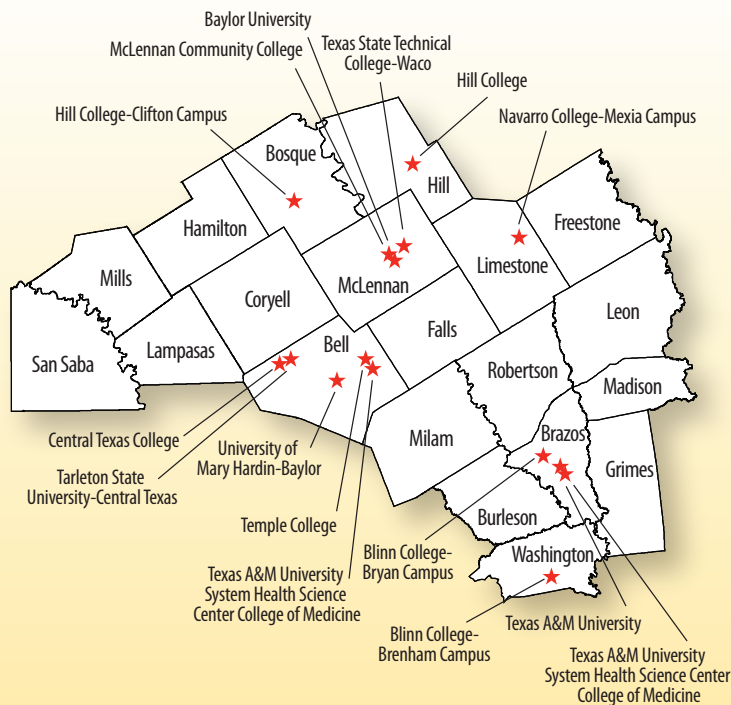
The average Central Texas teacher salary in 2007-08 was \$3,803 below the statewide average of \$46,179. Orenda Charter School had the highest average salary at \$46,412.

Average salaries in the region rose by 13.5 percent from 2002-03 to 2007-08, compared with a statewide average rise of 15.5 percent over the same period. Mumford ISD had the highest increase over this period at more than 37 percent.

The region's teacher salaries accounted for more than 28 percent of total district expenditures from all funds in 2007-08, about half of the statewide average of 64.1 percent. Cherokee ISD had the highest percentage of teacher salaries to total expenditures, at 47.4 percent. All of the districts in the region



Exhibit 43

**Central Texas Higher Education Institutions**

Source: Texas Higher Education Coordinating Board.

devoted a lesser percentage of expenditures to teacher salaries than the statewide average.

In 2007-08, the region had a lower number of students per teacher, at 13.7 versus the statewide average of 14.7. Star ISD had the lowest number of students per teacher, at 4.4.<sup>7</sup>

**Higher Education**

The Central Texas region has 11 institutions of higher education (**Exhibit 43**) that administer 15 campuses across the region. Seven of the region's 20 counties have at least one higher education campus (**Exhibit 44**).<sup>8</sup>

The region's only four-year public university, Texas A&M University (TAMU), is located in Brazos County. Tarleton State University operates Tarleton State University-Central Texas in Killeen, an upper-level institution serving junior, senior and graduate students.

Exhibit 44

**Higher Education Campuses, Central Texas Region**

| Institution   | City            | County     |
|---|-----------------|------------|
| Central Texas College   | Killeen         | Bell       |
| Tarleton State University – Central Texas                             | Killeen         | Bell       |
| Temple College  | Temple          | Bell       |
| Texas A&M University System Health Science Center College of Medicine | Temple          | Bell       |
| University of Mary Hardin-Baylor                                      | Belton          | Bell       |
| Hill College – Clifton Campus   | Clifton         | Bosque     |
| Blinn College – Brenham Campus  | Brenham         | Washington |
| Blinn College – Bryan Campus  | Bryan           | Brazos     |
| Texas A&M University  | College Station | Brazos     |
| Texas A&M University System Health Science Center College of Medicine | College Station | Brazos     |
| Hill College  | Hillsboro       | Hill       |
| Navarro College – Mexia Campus  | Mexia           | Limestone  |
| Baylor University   | Waco            | McLennan   |
| McLennan Community College  | Waco            | McLennan   |
| Texas State Technical College – Waco                                  | Bellmead        | McLennan   |

Source: Texas Higher Education Coordinating Board.



## George Bush Presidential Library and Museum

Nestled in College Station on Texas A&M University's West Campus, the George Bush Presidential Library and Museum celebrates the life and career of our nation's 41st president. The museum, opened in 1997, exhibits more than 90,000 artifacts, including a portion of the Berlin Wall, thousands of gifts from heads of state around the world and a WWII-era torpedo bomber aircraft. The library and museum receive approximately 140,000 visitors per year.<sup>9</sup>

Museum exhibits highlight numerous landmarks from Bush's presidency, such as the Kuwaiti Door, a wooden door given to Bush by the Emir of Kuwait in 1993 as a symbol of friendship. An interactive display allows visitors to view points of light on a fiber-optic map of the U.S., depicting Bush's famous "Thousand Points of Light" speech. A replica Oval Office, complete with presidential desk, allows visitors to sit in the "seat of power."

Other exhibits examine Barbara Bush's achievements as first lady, including her efforts to encourage literacy. The museum also offers visitors a look at George Bush's private life. Visitors can view a film about his childhood as well as his experiences as a husband, father and leader of the United States.<sup>10</sup>

Picturesque surroundings add to the visitor's enjoyment. Behind the library, a walking trail leads around a pond complemented by the Barbara Bush Rose Garden. A statue of horses trampling chunks of the Berlin Wall, symbolizing its destruction during Bush's presidency, stands in front of the library. The Presidential Conference Center and neighboring Bush Academic Building, which houses Texas A&M's economics and political science programs, sit adjacent to the library and museum.

An \$8.3 million renovation in 2007 further improved this already memorable site. In November 2007, George Bush celebrated the grand reopening and 10th anniversary of his presidential library by sky-diving above it. The former president has made several sky dives above the library, beginning in 2004, on his 80th birthday.<sup>11</sup>

Tarleton State-Central Texas is expected to become Texas A&M University-Central Texas by September 2009. The Texas Higher Education Coordinating Board must certify that Tarleton State University-Central Texas has reached a total of 1,000 full-time student equivalents (FTSE) enrollment in order to become a free-standing university.<sup>12</sup> The name change then must be approved by the Texas A&M University System Board of Regents.

The College of Medicine of the Texas A&M Health Science Center (TAMHSC) teams with Scott & White in Temple and the Central Texas Veterans Health Care System in Waco in its clinical education programs. TAMHSC also has clinical partnerships with the Carl R. Darnall Army Medical Center in the Temple-Fort Hood area and the Brazos Family Medical Residency in Bryan-College Station.<sup>13</sup>

Central Texas has six community college districts — Central Texas College, Temple College, Hill College, Blinn College, Navarro College, and McLennan Community College — with a total of seven campuses in six counties. In addition, the region has a branch of Texas State Technical College in Waco.

Finally, Central Texas is home to two private universities, Baylor University in Waco and the University of Mary Hardin-Baylor in Belton.

## Enrollment

In fall 2008, 112,189 students were enrolled in the Central Texas region's public and private colleges and universities. Enrollment in public and private four-year universities accounted for 58.2 percent of the total, while the remaining 41.8 percent were enrolled in two-year institutions.



Texas A&M University has the largest enrollment, with 48,039 students. The institution with the smallest enrollment was Hill College with 3,712 during fall 2008.

Total enrollment in the region's higher education institutions rose by 18.7 percent between 2000 and 2008. Enrollment at two-year institutions rose by 37.2 percent compared with just 8.2 percent for universities. In numerical terms, universities added 4,933 students while two-year college enrollment rose by 12,710. For the state as a whole, public university enrollment increased by 22.8 percent, while enrollment at public two-year institutions, including community colleges, rose by 37.8 percent.

Among the region's institutions, Hill College had the largest percentage enrollment growth between 2000 and 2008, adding 1,206 students for a 48.1 percent increase (**Exhibit 45**). Numerically, TAMU added

the greatest number in student population in the region during 2000 to 2008 increasing by 4,013 students.<sup>14</sup>

## Accessibility

Of 18,816 first-time applicants for undergraduate admission at TAMU for Fall 2008, the institution accepted 76.4 percent, less than the statewide average of 85.9 percent. The share of students accepted by TAMU who were at the top of their high school graduating classes was more than twice the statewide average share. Of 14,379 students accepted to TAMU, 44 percent were in the top 10 percent of their high school graduating classes, compared with 20.4 percent statewide.<sup>15</sup>

## Outcomes

Because some degrees require more than four years of study, and because some students may need more time to graduate,

*Total enrollment in the region's higher education institutions rose by 18.7 percent between 2000 and 2008.*

### Renaissance Festival

The Texas Renaissance Festival, held on land located between Plantersville and Magnolia, provides entertainment on eight consecutive weekends in the months of October and November. The festival features choreographed swordfights, shows including birds of prey, comedy routines, music and arts and crafts. Demonstrations at the festival include glassblowing, broommaking and printmaking, featuring a reproduction of the famed Guttenberg press. Guests are encouraged to dress up in Renaissance garb for the festival, which bills itself as the nation's largest and most acclaimed of its kind.

The festival also features a number of activities for kids, including elephant rides, a children's petting zoo and archery. Various booths offer food and drink throughout the festival. The festival also hosts school days for school-aged children two days out of the year.

The festival holds a variety of theme weekends, including Pirate Adventure and Celtic Christmas. Couples can marry at five different wedding venues on the festival grounds.

The festival supports two charities, the Spina Bifida Association Houston Gulf Coast Chapter and the Society of Samaritans. Each day closes with a fireworks display. On-site camping for the festival is available.<sup>16</sup>



Exhibit 45

**Central Texas Region, Fall Headcount Enrollment 2000 and 2008**

| Public Institutions                               | Fall 2000 Enrollment | Fall 2008 Enrollment | Enrollment Change | Percent Change |
|---|----------------------|----------------------|-------------------|----------------|
| Texas A&M University                              | 44,026               | 48,039               | 4,013             | 9.1%           |
| <b>Regional Total – Public Universities</b>       | <b>44,026</b>        | <b>48,039</b>        | <b>4,013</b>      | <b>9.1%</b>    |
| <b>Statewide Total – Public Universities</b>      | <b>414,626</b>       | <b>509,136</b>       | <b>94,510</b>     | <b>22.8%</b>   |
| Blinn College                                     | 12,025               | 15,602               | 3,557             | 29.7           |
| Central Texas College                             | 6,650                | 9,481                | 2,831             | 42.6           |
| Hill College                                      | 2,506                | 3,712                | 1,206             | 48.1           |
| McLennan Community College                        | 5,721                | 7,855                | 2,134             | 37.3           |
| Temple College                                    | 3,381                | 5,178                | 1,797             | 53.1           |
| Texas State Technical College – Waco              | 3,928                | 5,093                | 1,165             | 29.7           |
| <b>Regional Total – Two-year Public Colleges</b>  | <b>34,211</b>        | <b>46,921</b>        | <b>12,710</b>     | <b>37.2%</b>   |
| <b>Statewide Total – Two-year Public Colleges</b> | <b>447,998</b>       | <b>617,507</b>       | <b>169,509</b>    | <b>37.8%</b>   |
| Private Institutions                              | Fall 2000 Enrollment | Fall 2008 Enrollment | Enrollment Change | Percent Change |
| Baylor University                                 | 13,719               | 14,541               | 822               | 6.0%           |
| University of Mary Hardin-Baylor                  | 2,590                | 2,688                | 98                | 3.5            |
| <b>Regional Total – Private Universities</b>      | <b>16,309</b>        | <b>15,745</b>        | <b>-564</b>       | <b>-3.5%</b>   |
| <b>Statewide Total – Private Universities</b>     | <b>107,681</b>       | <b>115,048</b>       | <b>7,367</b>      | <b>6.8%</b>    |
|   | Fall 2000 Enrollment | Fall 2008 Enrollment | Enrollment Change | Percent Change |
| <b>Regional Total 2-Year Institutions</b>         | <b>34,211</b>        | <b>46,921</b>        | <b>12,710</b>     | <b>37.2%</b>   |
| <b>Regional Total 4-Year Institutions</b>         | <b>60,335</b>        | <b>65,268</b>        | <b>4,933</b>      | <b>8.2%</b>    |
|   |                      |                      |                   |                |
| <b>Regional Total Higher Education</b>            | <b>94,546</b>        | <b>112,189</b>       | <b>17,643</b>     | <b>18.7%</b>   |

Note: Regional data do not include enrollment data for branch campuses located in Central Texas that are part of a main campus located in other regions, since they are not reported separately to the Texas Higher Education Coordinating Board. Data for all institutions includes health-related and independent institutions.  
Source: Texas Higher Education Coordinating Board.

the Texas Higher Education Coordinating Board (THECB) compares four-year and six-year graduation rates to measure university outcomes. TAMU's four- and six-year graduation rates were 42.6 percent and 81.6 percent, respectively, in fiscal 2007, much higher than the statewide averages of 25.1 percent for four-year and 57.2 percent for six-year graduates.

Since many community college students go on to a university to obtain a four-year degree, THECB compares three-year and six-year graduation rates to measure community college outcomes. Texas State Technical College-Waco (TSTC-Waco) had the region's highest three-year graduation rate in fiscal 2007, while Blinn College had the highest six-year graduation rate. Blinn College,



McLennan Community College, Temple College and TSTC-Waco ranked above the statewide average for both three- and six-year graduation rates in fiscal 2007. Hill College also outpaced the state average for three-year graduation rate and closely matched the state's six-year graduation rate of 30.8 percent (**Exhibit 46**).

From fiscal 2000 to fiscal 2007, TAMU's number of degrees awarded annually rose by 11.8 percent, to 10,627. The statewide average increase was 30.3 percent (**Exhibit 47**).

Over the same period, the number of degrees and certificates that Texas community

colleges awarded increased by 49.2 percent. Among the region's six community colleges, Blinn College had the sharpest increase in degrees awarded, at 69.5 percent (**Exhibit 48**). Central Texas College awarded the greatest number of degrees in fiscal 2008 with 1,390, followed by Blinn College at 1,093 and TSTC-Waco with 899.<sup>17</sup>

## Affordability

From 2002-03 to 2008-09, TAMU's annual estimated costs for a student's tuition and fees, based on 15 credit hours per semester, rose by about 60 percent, to \$7,899. The

Exhibit 46

### Three- and Six-Year Graduation Rates, (First-time, Full-time, Credential-seeking Students), Central Texas Community Colleges vs. Statewide Average Fiscal 2000 and 2007

| Institution                          | Fiscal 2000<br>3-year | Fiscal 2000<br>6-year | Fiscal 2007<br>3-year | Fiscal 2007<br>6-year |
|--------------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Blinn College                        | 13.8%                 | 37.4%                 | 8.2%                  | 48.4%                 |
| Central Texas College                | 13.2                  | 27.2                  | 6.8                   | 27.7                  |
| Hill College                         | 21.5                  | 29.4                  | 20.1                  | 30.1                  |
| McLennan Community College           | 10.8                  | 31.4                  | 12.9                  | 36.4                  |
| Temple College                       | 9.6                   | 33.1                  | 9.5                   | 36.5                  |
| Texas State Technical College – Waco | 28.6                  | 37.0                  | 26.5                  | 38.4                  |
| <b>Statewide Average</b>             | <b>10.8%</b>          | <b>25.7%</b>          | <b>11.1%</b>          | <b>30.8%</b>          |

Source: Texas Higher Education Coordinating Board.

Exhibit 47

### Degrees Awarded, Central Texas Region Public Universities Central Texas Region vs. State, Fiscal 2000 and 2007

| Institution            | Fiscal 2000   | Fiscal 2007    | Difference    | % Change     |
|------------------------|---------------|----------------|---------------|--------------|
| Texas A&M University   | 9,508         | 10,627         | 1,119         | 11.8%        |
| <b>Statewide Total</b> | <b>78,954</b> | <b>102,897</b> | <b>23,943</b> | <b>30.3%</b> |

Source: Texas Higher Education Coordinating Board.





## Exhibit 48

**Degrees and Certificates Awarded, Central Texas Region Two-Year Colleges  
Fiscal 2000 vs. 2008**

| Institution                          | Fiscal 2000   | Fiscal 2008   | Difference    | % Change     |
|--------------------------------------|---------------|---------------|---------------|--------------|
| Blinn College                        | 645           | 1,093         | 448           | 69.5%        |
| Central Texas College                | 1,242         | 1,390         | 148           | 11.9         |
| Hill College                         | 280           | 449           | 169           | 60.4         |
| McLennan Community College           | 651           | 793           | 142           | 21.8         |
| Temple College                       | 364           | 466           | 102           | 28.0         |
| Texas State Technical College – Waco | 961           | 899           | -62           | -6.5         |
| <b>Regional Total</b>                | <b>4,143</b>  | <b>5,090</b>  | <b>947</b>    | <b>22.9%</b> |
| <b>Statewide</b>                     | <b>37,395</b> | <b>55,809</b> | <b>18,414</b> | <b>49.2%</b> |

Source: Texas Higher Education Coordinating Board.

statewide average for undergraduate tuition and fees rose by about 80 percent, to \$6,193.

For the 2007-08 school year, the estimated annual cost of tuition and fees, books and supplies, room and board, transportation and personal expenses at TAMU (based on 15 credit hours in both fall and spring) was \$19,950. The statewide average was \$18,389.

The cost of the region's private universities is higher than the statewide average for such institutions. For 2008-09, the estimated annual cost of tuition and fees, books and supplies, room and board, transportation and personal expenses was \$40,144 at Baylor University and \$30,000 at the University of Mary Hardin-Baylor. The statewide average for private institutions was \$29,859.

From 2002-03 to 2008-09, resident tuition and fee changes at the region's six community colleges ranged from an increase of \$127 at Central Texas College to \$972 more at McLennan Community College. Meanwhile, the statewide average increase for community colleges was about \$675 or about 60.3 percent. In 2008-09, tuition and fees in the

region were lowest at Central Texas College, at \$1,470, and highest at McLennan Community College, at \$2,100.<sup>18</sup>

The total cost of attending the Central Texas region's community colleges in 2008-09, including tuition and fees, books and supplies, room and board, transportation and personal expenses for two semesters, ranged from \$10,012 for McLennan Community College to \$15,410 for Hill College. The statewide average for community colleges was \$12,510.<sup>19</sup>

## Funding

Total revenue for TAMU, including tuition and fees, general revenue appropriations, federal funds and institutional funds, rose by 24.4 percent from fiscal 2006 to fiscal 2008, compared to a statewide average rise of 15.6 percent for public universities. (Exhibit 49).<sup>20</sup>

Total appropriations for the 2008-09 biennium increased for all of the region's community colleges. Between 2002-03 and 2008-09, statewide appropriations for all community colleges rose by 8 percent (Exhibit 50).<sup>21</sup>



## Exhibit 49

**Public Universities Total Revenues Sources, Texas A&M University and Statewide, Fiscal 2006 and Fiscal 2008*****Texas A&M University***

| Revenue Source       | Fiscal 2006          | Fiscal 2008          | % Increase   |
|----------------------|----------------------|----------------------|--------------|
| Tuition and fees     | \$223,224,830        | \$276,913,639        | 24.1%        |
| State appropriations | 304,385,246          | 346,882,403          | 14.0         |
| Federal funds        | 75,041,156           | 81,908,778           | 9.2          |
| Institutional funds  | 155,587,750          | 237,695,541          | 52.8         |
| <b>Total Revenue</b> | <b>\$758,238,983</b> | <b>\$943,400,361</b> | <b>24.4%</b> |

***Statewide***

| Revenue Source       | Fiscal 2006            | Fiscal 2008            | % Increase   |
|----------------------|------------------------|------------------------|--------------|
| Tuition and fees     | \$2,000,693,293        | \$2,400,749,604        | 20.0%        |
| State appropriations | 2,599,091,546          | 2,949,486,914          | 13.5         |
| Federal funds        | 1,161,122,338          | 1,260,930,090          | 8.6          |
| Institutional funds  | 1,375,219,819          | 1,638,009,659          | 19.1         |
| <b>Total Revenue</b> | <b>\$7,136,126,996</b> | <b>\$8,249,176,267</b> | <b>15.6%</b> |

Source: Texas Higher Education Coordinating Board.

## Exhibit 50

**General Revenue Appropriations, Public Community and Technical Colleges  
Central Texas Region and Statewide, Fiscal 2002-2009**

| Institution   | 2002-03<br>Biennium    | 2004-05<br>Biennium    | 2006-07<br>Biennium    | 2008-09<br>Biennium    | % Change<br>2002-03 to<br>2008-09 |
|---|------------------------|------------------------|------------------------|------------------------|-----------------------------------|
| Blinn College   | \$40,123,832           | \$36,796,275           | \$37,744,228           | \$41,139,958           | 2.5%                              |
| Central Texas College   | 35,986,374             | 35,886,775             | 38,724,256             | 40,026,227             | 11.2                              |
| Hill College  | 9,982,342              | 10,715,664             | 11,069,698             | 12,995,631             | 30.2                              |
| McLennan Community College  | 23,068,770             | 23,793,868             | 26,555,732             | 27,607,204             | 19.7                              |
| Temple College  | 12,624,594             | 12,165,215             | 12,310,414             | 14,101,299             | 11.7                              |
| Texas State Technical College – Waco                                | 49,706,313             | 38,934,116             | 48,373,644             | 50,904,009             | 2.4                               |
| <b>Public Community &amp; Technical College<br/>Statewide Total</b> | <b>\$1,709,158,821</b> | <b>\$1,622,141,439</b> | <b>\$1,763,114,757</b> | <b>\$1,845,292,200</b> | <b>8.0%</b>                       |

Source: Texas Higher Education Coordinating Board.



## Museums

The Central Texas region is home to several independent museums. The mission of Brazos Valley Children's Museum in Bryan is "to provide a child-centered, hands-on, interactive environment for learning and discovery for children."

The museum features educational videos, a community quilt display, a room built upside down and an arts display where children can perform plays or paint their faces. The museum also includes daily children's programming including reading time, a healthy kids presentation and "Monday Madness," a fun crafts project.<sup>22</sup>

With the establishment of the Texas Sports Hall of Fame in Waco, "Texas became the first state to honor its athletes with a hall of fame." The hall of fame was the idea of former sports editor Thad Johnson of the *Beaumont Enterprise*, who presented it before the Texas Sportswriters Association for unanimous approval in 1949. Today, the hall features memorabilia from inductees including Troy Aikman, Earl Campbell and Clyde Drexler, among other notable luminaries.<sup>23</sup>

Fairfield's Freestone County Museum was once a jail. Built in 1879 to "fortress-like specifications," the jail included prison cells, referred to as the "dungeon," with living quarters for the sheriff and his family downstairs. The jail became a museum in 1968 and today houses artifacts from the Civil War. The grounds also include two log cabins, an antique telephone museum and an Assembly of God church built in the 1930s to reform bootleggers during the time of Prohibition. Admission is free.<sup>24</sup>

Caldwell's Burleson County Czech Heritage Museum was created to "promote and preserve the unique heritage and culture of the Czech people in Europe and the Czech settlers in this part of Texas." The museum houses items used by Texas Czech settlers, rare cut crystal and pottery and various Czech instruments. Burleson itself is known as "the Kolache capital of Texas," and Caldwell is the location for the annual Kolache Festival, featuring a wonderful array of Czech foods and presentations on basket weaving, woodcutting, and quilting.<sup>25</sup>

## Central Texas Region Museums

| County     | City        | Museum                                 |
|------------|-------------|--|
| Brazos     | Bryan       | Children's Museum of the Brazos Valley |
| Bosque     | Clifton     | Bosque Museum                          |
| Burleson   | Caldwell    | Burleson County Czech Heritage Museum  |
| Coryell    | Gatesville  | Coryell Museum and Historical Center   |
| Falls      | Marlin      | Falls County Museum                    |
| Freestone  | Fairfield   | Freestone County Museum                |
| McLennan   | Waco        | Armstrong Browning Library             |
| McLennan   | Waco        | Texas Sports Hall of Fame              |
| McLennan   | Waco        | Texas Ranger Hall of Fame and Museum   |
| Milam      | Cameron     | Milam County Historical Museum         |
| Mills      | Goldthwaite | Mills County Museum                    |
| San Saba   | San Saba    | San Saba County Historical Museum      |
| Washington | Brenham     | Brenham Heritage Museum                |

Source: Texas Comptroller of Public Accounts.



Contact hours — the time a professor actually spends in the classroom with students — for community, state and technical colleges rose 21.1 percent statewide from fall 2000 to fall 2007. In the Central Texas region, contact hours increased at all

community colleges with the exception of Central Texas College. The largest increases were at Temple College with 42.9 percent, Hill College at 31.6 percent and McLennan Community College at 23.9 percent (**Exhibit 51**).<sup>26</sup>

**Bosque Museum**

The Bosque Museum in Clifton celebrates the Norwegian heritage of Bosque County's early settlers by showcasing numerous artifacts that once belonged to them, including jewelry, folk art, books and even handmade furniture. The museum's Norwegian Collection is the largest in the South and Southwest, with artifacts dating back to the 1850s. The museum's gift shop offers Norwegian and Scandinavian recipes once used by county settlers.

The museum boasts several other collections as well. For example, its Pioneer Collection contains items used during the days of the Chisholm Trail, a cattle drive that linked Texas with Oklahoma and Missouri in the late 19th century. An authentic one-room pioneer cabin originally built in the 1850s graces the museum grounds. A firearms collection of more than 150 guns is on display. One impressive exhibit includes firearms used in every U.S. conflict from the American Revolution through World War II.

In 2006, the Bosque Museum opened the Horn Shelter, an exhibit replicating the burial site of two Paleo-American skeletons found in the county. Carbon dating analysis estimates the skeletons' ages at 11,200 years; only three such sites have been found with funeral-related items in the U.S. The Horn Shelter complements the museum's already substantial collection of Indian artifacts.<sup>27</sup>

Exhibit 51

**Community, State and Technical Colleges, Contact Hours Fall 2000 vs. Fall 2007, Central Texas Region**

| Institution   | Fall 2000         | Fall 2007         | % Change 2000 to 2007 |
|---|-------------------|-------------------|-----------------------|
| Blinn College   | 2,362,101         | 2,542,934         | 7.7%                  |
| Central Texas College   | 1,245,528         | 1,041,056         | -16.4                 |
| Hill College  | 541,840           | 712,832           | 31.6                  |
| McLennan Community College                                      | 995,104           | 1,233,189         | 23.9                  |
| Texas State Technical College – Waco                            | 4,133,422         | 4,302,780         | 4.1                   |
| Temple College  | 585,182           | 836,092           | 42.9                  |
| <b>Public Community &amp; Technical College Statewide Total</b> | <b>73,370,630</b> | <b>88,822,358</b> | <b>21.1%</b>          |

Note: Contact hours include only those with a full- or part-time faculty instructing by lecture, lab or practicum. Classes taught at an inter-institutional location are excluded.  
Source: Texas Higher Education Coordinating Board.



## Industry Profile: Higher Education

The Central Texas region has a full complement of higher education institutions, with a major public research university and a private research university, a number of community colleges and a state supported technical college.

### Texas A&M University

Located in College Station, in the heart of the Brazos Valley, Texas A&M University plays an integral role in the educational, social and economic fabric of Central Texas.

Texas A&M was established as a land-grant college in 1871. Originally, the Agricultural and Mechanical College of Texas was an all-male military college known for its Corps of Cadets program, and remained so until university president General James Earl Rudder made Corps participation voluntary and opened the school to women in the 1960s.<sup>28</sup>

The university is by far the region's largest, with 48,039 students enrolled for the 2008-2009 academic year, or about 43 percent of all students attending two- and four-year educational institutions in the region. Texas A&M offers more than 120 undergraduate degree programs and 240 graduate programs. The university's agriculture, engineering, business and veterinary programs are among the most highly rated; the school of engineering consistently ranks among *U.S. News and World Report's* top 10 undergraduate and graduate programs, as does its veterinary school.<sup>29</sup>

But Texas A&M's influence on the Central Texas region extends far beyond academics. For example, each year thousands of Aggies come together for the BIG Event, a day-long service event that consists of a number of projects in the Bryan-College Station area. Since its inception in 1982, the BIG Event has grown to become the nation's largest single-day, student-run service project. Individual

projects involve activities such as applying a fresh layer of paint to a home exterior or picking up litter from the side of the road. In the words of the event's founder, Joe Nussbaum, the BIG Event is a way for students to say "thank you" to the surrounding community.<sup>30</sup>

With 48,000-plus students and more than 21,000 employees, Texas A&M has a profound economic effect on Central Texas. An in-house study conducted in 2007 estimates the university's economic impact on Brazos County at \$2.7 billion in 2006 alone. The study incorporates a multiplier that accounts for dollars as they circulate throughout the community. Absent the multiplier, the study estimates the direct economic impact of the A&M System on Brazos County at \$1.1 billion annually.

### Texas A&M University System



\* Note: Texas A&M has satellite campuses in Galveston and the country Qatar; system affiliates are located in cities around the state including Texarkana, Corpus Christi and Kingsville.  
Source: Texas A&M University System.



## Industry Profile: Higher Education (cont.)

Texas A&M is perhaps most well-known for its rich history of student traditions. According to the 12th Man tradition, for example, the entire student body stands during football games in support of the team. The practice was started by a student named E. King Gill, who was called from the stands in 1922 to suit up in case the team needed him.<sup>31</sup>

In 2007, *Washington Monthly* ranked Texas A&M first in the nation for tangible contributions to the public interest, based on its high levels of dedication in areas such as community service, student success and academic research.

### Baylor University

Baylor University, the world's largest Baptist university, is a privately owned institution in Waco that is home to more than 14,000 students from all 50 states. Fall 2008 enrollment totaled 14,541, up 6% from year 2000 enrollment.<sup>32</sup>

While the university specializes in liberal arts, it offers outstanding programs in many other areas as well. For example, *U.S. News and World Report* ranked Baylor's Entrepreneurship program 14th in the nation in 2008.<sup>33</sup> The diversity of Baylor's educational offerings is reflected in its theological seminary, law school, nursing program and several other programs. In all, Baylor offers nearly 150 undergraduate study programs that range from theater performance to mechanical engineering.<sup>34</sup>

Founded in 1845, Baylor is among the state's oldest private universities. Originally located in Independence, Texas, Baylor consolidated with Waco University to become Baylor University in Waco in 1886. The university grew significantly in the early 20th century, when several new schools were established, including schools of education, law, business and music. In addition, Baylor opened several medicine-related schools in Dallas and established Baylor Theological Seminary as a separate entity.

Baylor's various programs have grown extensively throughout the years. The university restructured in the

1990s, clarifying the roles of its various programs; since then, university attendance has continued to grow.<sup>35</sup>

In addition to a diverse academic experience, Baylor also offers historical and cultural items of interest. The university's Armstrong Browning Library contains a collection of 62 stained glass windows — possibly the largest secular collection of stained glass windows in the world. The library was founded to honor the works of Victorian-era poets Robert and Elizabeth Barrett Browning.<sup>36</sup>

Other points of interest include a newly renovated bear habitat where visitors can view several American black bears. The Bill and Eva Williams Bear Habitat is a USDA-licensed zoo that hosts a bear-friendly environment complete with pools and a waterfall. The university mascots are two American black bears named Joy and Lady.<sup>37</sup> Baylor is the only private university that is a part of the Big 12 Conference.

### McLennan Community College

McLennan Community College (MCC), which offers both university transfer and career programs, has served the Central Texas region since 1966, when it held its first classes on James Connally Air Force Base. At the time there were 855 students. Enrollment since then has risen by about 6 percent annually to its current level of about 8,000 students per semester.<sup>38</sup>

MCC is located on a 200-acre campus in Waco and it also owns a 200-acre farm about five miles from the main campus. MCC continues to expand and has three new buildings under construction; a general classroom building, a science building and an emergency services center. MCC partnered with the city of Waco to begin construction of a state-of-the-art Emergency Services Center, which includes classroom space for its emergency medical services, criminal justice and forensic science programs, a police academy and a fire academy, including a six-story "burn tower."<sup>39</sup>

MCC offers both academic and technical courses. MCC offers three degrees (Associate in Arts, Associate in Science and Associate of Arts in Teaching) designed for





## Industry Profile: Higher Education (cont.)

transfer to a four-year institution. Each contains a core curriculum of courses recognized by Texas four-year institutions — communication, natural science, mathematics, humanities and arts, as well as the social and behavioral sciences. MCC also partners with state-funded universities to allow its students to earn bachelor's, master's and doctoral degrees at a University Center located on its campus.

For students interested in career programs, MCC offers certificates and Associate in Applied Science degrees in a wide range of areas including health sciences, paralegal, sign language interpretation and veterinary and medical technology. A 2006 survey found that MCC had trained 68 percent of all healthcare workers at two Waco hospitals and affiliated clinics.<sup>40</sup> The college offers a two-year degree in nursing that prepares students for employment in a variety of settings including hospitals, clinics and long-term care facilities, making it the county's primary provider of nurses.

### **Texas State Technical College - Waco**

As part of the only state-supported technical college system in Texas, Texas State Technical College in Waco (TSTC-Waco) offers associate degrees and certificate programs in high-demand fields and emerging technologies. During fiscal 2007, TSTC-Waco had 6,642 students enrolled and awarded 1,032 degrees and certificates.<sup>41</sup>

The TSTC-Waco campus is located on the former site of the James Connally Air Force Base and is situated on 2,100 acres, purchased by the state in 1967.<sup>42</sup>

Students who graduate from TSTC can earn good starting salaries. Based on student follow-up surveys conducted one year after graduation, the average starting salary for TSTC Waco graduates with an associate degree is \$32,000.<sup>43</sup>

TSTC-Waco is part of the Texas State Technical College System, established under the Texas Education Code to deliver technical education courses as a two-year post-secondary institution. Its mission is further defined in law to include contributing to the economic and educational development of the state and improving the ability of Texas businesses to remain competitive.<sup>44</sup> To accomplish

this mission, TSTC-Waco offers Associate of Applied Science degrees, certificates, transfer credit and customized training programs.

### **Associate of Applied Science/Certificate**

Credits earned at TSTC - Waco can be applied toward an associate degree or certificate or transferred to a university under articulation agreements in fields including:

|                          |                                   |
|--------------------------|-----------------------------------|
| advertising design;      | electrical power;                 |
| media communication;     | instrumentation;                  |
| biomedical equipment;    | computerized controls;            |
| laser electro-optics;    | robotics;                         |
| gaming and simulation;   | pharmacy technician;              |
| nanotechnology;          | chemical/environmental            |
| diesel and automotive    | laboratory technician;            |
| repair and maintenance;  | geographic information            |
| building construction;   | systems;                          |
| electronics;             | surveying;                        |
| golf course/landscape    | semiconductor                     |
| management;              | manufacturing;                    |
| drafting/design;         | fuel cells/alternative            |
| welding;                 | energy;                           |
| dental assistance;       | industrial systems and            |
| environmental health/    | engineering;                      |
| safety;                  | digital media design;             |
| refrigeration;           | computer maintenance;             |
| culinary arts;           | networking;                       |
| aircraft pilot training; | computer science;                 |
| aviation maintenance;    | network security;                 |
| avionics;                | digital forensics; and            |
| mechanical engineering;  | telecommunications. <sup>45</sup> |

### **Customized Training**

TSTC-Waco provides needs analysis, curriculum development, technical skill benchmarking, certification training, grant development/administration and fully customized training for incumbent workers meeting new duties and responsibilities, and to provide retraining for displaced workers.<sup>46</sup>



## St. Clare Horse Farm

The Monastery of St. Clare Miniature Horse Farm, Located in Brenham between Austin and Houston, is home to a group of Franciscan Poor Clare Nuns who support themselves via alms from the community, supplementing that income with the sale of miniature horses, ceramics and crafts. The nuns have been making ceramics for more than 40 years and sell a variety of Christmas tree ornaments and Christmas-related items. Arts and crafts are available through the Nuns' Art Barn gift shop located on the premises.

The group has been raising miniature horses since 1981, also selling equipment associated with the miniature horse care industry, such as carts and harnesses. New foals are born in the spring, offering community groups and school children a rare chance to view these tiny creatures, which weigh an average of just 20 pounds at birth.

The nuns' AutumnFest event, held in October, includes fun activities such as cart rides, games and races for children as well as pumpkin painting. The AutumnFest is run entirely by volunteers.<sup>47</sup>

## Endnotes

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- <sup>2</sup> Blinn College, "If I Had a Hammer," pp. 1-2, <http://www.blinn.edu/hammer/>, (Last visited March 20, 2009); and interview with Gena Parsons, public information officer, Blinn College, Bryan, Texas, February 3, 2009.
- <sup>3</sup> Gena Parsons and Michael Schaefer, "Hammering Home the Importance of Education," *NISOD Innovation Abstracts* (October 13, 2006), p. 2, [http://matcmadison.edu/cetl/resources/archive/data\\_nisod/XXVIII\\_22.pdf](http://matcmadison.edu/cetl/resources/archive/data_nisod/XXVIII_22.pdf). (Last visited March 20, 2009.)
- <sup>4</sup> Economic Modeling Specialists, Inc., "Educational Attainment Data Report," <http://www.west.economicmodeling.com/internal/modules/home/index.php?#EducationalAttainmentDataReport>. (Last visited April 29, 2009.)
- <sup>5</sup> Shakespeare at Winedale, "Shakespeare at Winedale," p. 1, <http://www.shakespeare-winedale.org/>; and Shakespeare at Winedale, "Spring and Summer Courses," p. 1, <http://www.shakespeare-winedale.org/courses/>. (Last visited March 11, 2009.)
- <sup>6</sup> Data provided by Texas Education Agency, "2007-08 Academic Excellence Indicator System District Reports," <http://ritter.tea.state.tx.us/perfreport/aeis/2008/district.srch.html>, with calculations by the Texas Comptroller's Office. (Last visited April 7, 2009.)
- <sup>7</sup> Data provided by Texas Education Agency, "2007-2008 Staff FTE Counts and Salary Reports," <http://ritter.tea.state.tx.us/adhocrpt/adpeb08.html>, with calculations by the Texas Comptroller's Office. (Last visited April 7, 2009.); and data provided by Texas Education Agency, "2007-08 Academic Excellence Indicator System District Reports."
- <sup>8</sup> Texas Higher Education Coordinating Board, "Higher Education Locator Map (HELM) – State of Texas – Central Region," <http://www.theeb.state.tx.us/InteractiveTools/HELM/Region.cfm?RegionID=7>. (Last visited March 24, 2008.)
- <sup>9</sup> George Bush Presidential Library and Museum, "Museum Facts," pp. 1-2, [http://bushlibrary.tamu.edu/information/museum\\_facts.php/](http://bushlibrary.tamu.edu/information/museum_facts.php/). (Last visited March 20, 2009.); and Vic Gold, "Welcome to Clintonland," *Washingtonian.com* (August 1, 2007), p. 4, <http://www.washingtonion.com/articles/mediapolitics/4781.html>. (Last visited April 14, 2009.)
- <sup>10</sup> George Bush Presidential Library and Museum, "List of Areas," pp. 1-5, [http://bushlibrary.tamu.edu/museum/museum\\_tour/list.php](http://bushlibrary.tamu.edu/museum/museum_tour/list.php); and George Bush Presidential Library and Museum, "Museum Facts," pp. 1-2, [http://bushlibrary.tamu.edu/information/museum\\_facts.php/](http://bushlibrary.tamu.edu/information/museum_facts.php/). (Last visited March 20, 2009.)
- <sup>11</sup> "Ex-Pres Bush Goes Sky-Diving Again," *Washington Post* (November 11, 2007), <http://www.washingtonpost.com/wp-dyn/content/article/2007/11/11/AR2007111100546.html>. (Last visited January 16, 2009.)
- <sup>12</sup> Tarleton State University, "Tarleton-Central Texas to Become Texas A&M-Central Texas by fall 2009," Stephenville, Texas, January 29, 2009, <http://www.tarleton.edu/scripts/press/display.asp?id=2567&loc=TCT>. (Last visited March 24, 2009.) (Press release.)



- <sup>13</sup> Texas A&M Health Science Center, "About the Texas A&M Health Science Center," p. 1, <http://tamhsc.edu/about/index.html>. (Last visited March 24, 2009.)
- <sup>14</sup> Texas Higher Education Coordinating Board, data drawn from the Higher Education Accountability System database.
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# Conclusion

The Central Texas region is poised to continue steady economic growth. Its central location, quality health care and military community have served it well. But to continue its growth, the region must maintain its efforts to sustain and expand its infrastructure, meet the educational demands of its residents and attract new employment opportunities.

Central Texas prairie lands and rolling hills, crossed by rivers and streams, help support its rural character. The region has water supplies from major aquifers, as well as substantial coal, oil and natural gas deposits that should help it sustain strong economic growth. And the region's transportation system includes one of the nation's major transportation arteries, which helps to support both area and statewide economic activity.

The health care industry is a vibrant part of the regional economy. Hospitals are among its largest private employers, and the region also hosts the nation's fourth-largest VA medical complex. Medical services jobs command high salaries in the Central Texas region in occupations requiring a range of educational levels. On average, the region's physicians and surgeons earn a median salary of more than \$143,000. Medical jobs requiring far less postsecondary education are in high demand as well. Four of the region's

five highest-paying jobs requiring an associate degree are in the medical profession, led by diagnostic medical sonographers with median annual earnings of nearly \$86,000.

Central Texas school districts continue to serve a growing number of students. The region has a higher-than-average percentage of school districts and school campuses rated as Academically Acceptable, providing a strong foundation for future educational opportunities. Its 11 higher education institutions are expanding as well, significantly increasing the number of college graduates in Central Texas, and preparing the region's future work force.

The Comptroller's office is ready to help the Central Texas region meet its challenges with information and analysis. For assistance, please contact the Comptroller's Local Government Assistance and Economic Development Division at [www.window.state.tx.us/lga](http://www.window.state.tx.us/lga) or toll-free at (800) 531-5441, ext. 3-4679.

We will continue to provide local and state leaders with detailed information in this continuing series of reports. We hope you look forward to future publications, as we continue to highlight each of the state's 12 economic regions (**Exhibit 52**).

Please see the Comptroller's *Texas in Focus: A Statewide View of Opportunities* ([www.window.state.tx.us/specialrpt/tif](http://www.window.state.tx.us/specialrpt/tif)) for a statewide perspective, as well as *Texas in Focus: High Plains* ([www.window.state.tx.us/specialrpt/tif/highplains](http://www.window.state.tx.us/specialrpt/tif/highplains)), *Texas in Focus: South Texas* ([www.window.state.tx.us/specialrpt/tif/southtexas](http://www.window.state.tx.us/specialrpt/tif/southtexas)) and *Texas in Focus: Upper East Texas* ([www.window.state.tx.us/specialrpt/tif/uppereast](http://www.window.state.tx.us/specialrpt/tif/uppereast)) for a look at our previous regional reports in this series.



Exhibit 52

**Map of Economic Regions**

